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Research Report

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Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

THE BELIEVABILITY OF ADVERTISING MEDIA:

Results from a Recent Nationwide Survey

September 1981

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper industry and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

The Believability Of Advertising In Five Media

The impact of any advertisement on consumer buying behavior partially depends upon the consumers' perceptions of the believability of the advertising message. Three things, independent of the consumer, can influence the believability of any advertising message: the source of the message (the advertiser), the medium in which the advertisement appears, and the content of the message itself. This report deals with one of these components--the advertising medium.

Background: Previous Studies

The American Association of Advertising Agencies has periodically sponsored research on the consumers' perspectives concerning advertising and the role it plays in our society. Selected findings of those studies are summarized in Tables 1 and 2 to provide some idea of how consumers view advertising in general.

Over the ten year period covered by the 4A's studies, 1964-1974, the American consumer became more skeptical concerning advertising practices while, in general, accepting the principle that "advertising is essential." Only a minority believed that advertising "presents a true picture of the products advertised."

Table 1

4A Consumer Studies on Advertising, 1964-1974:
% Agreeing with Selected Statements

Advertising...	1964 N=(1846)	1967 (524)	1972 (300)	1974* (1801)
a. Is essential	78%	76%	74%	88%
b. Helps raise our standard of living	71	67	52	55
c. Results in better products for the public	74	72	62	57
d. In general results in lower prices	40	35	22	28
e. Often persuades people to buy things they shouldn't buy	65	65	63	82
f. Generally presents a true picture of the product advertised	41	37	30	41
g. Most advertising insults the intelligence of the average consumer	43	46	57	59

* Computed differently than in earlier studies. Represents only the responses to a positively worded question. Previous figures reflect a weighted sum of 2 questions, one positively and one negatively worded.

In the latest 4A's study, more than 4 out of 5 persons believed advertising persuades people to make unnecessary purchases. In the earlier studies just under two-thirds held that belief. Table 2 demonstrates that the percentage of consumers with unfavorable attitudes towards advertising in general increased somewhat over the 1964 to 1974 period.

Table 2

4A Studies--General Consumer, 1964-1974: Attitude Toward Advertising

	1964	1967	1972	1974*
N=	(1846)	(524)	(300)	(1801)
Favorable	41%	49%	41%	37%
Mixed	34	31	32	39
Unfavorable	14	15	18	21
Indifferent	8	3	7	3**
Unclassifiable	3	2	2	-
	100%	100%	100%	100%

*Question asked differently than in other studies. Favorable was computed using % responding completely or mostly favorable. Mixed was the % responding either slightly favorable or slightly unfavorable. Unfavorable was the % responding completely or mostly unfavorable. Earlier versions used coded open-ended responses to "How do you yourself feel about advertising?"

**Don't know/No answer.

Methodology: Present Study

The questions used in the survey reported on here were developed by the NAB research staff. A pre-test sample of about 85 respondents was used to evaluate the first set of questions developed.

Opinion Research Corporation conducted the fieldwork and processed the data. The questions were included in their August 1981 Caravan Express survey. A national probability sample of 1001 respondents was interviewed by telephone. The NAB questions were the only media-related questions which were asked in the survey.

The figures presented below are subject to a sampling error of no more than plus or minus three percentage points (at the 95% level). All ORC figures have been weighted to be representative of the 1980 adult population of the United States.

Two indices are presented in the table which appear below. In both the "Believability Index" and the "Most Believable Index", the results for newspapers are being compared to the results for television. In the Believability Index, the percentage of respondents selecting newspapers as either very believable or believable was divided by the corresponding percentage for television. In the Most Believable Index, the proportion of respondents selecting newspapers as the single most believable advertising medium was divided by the corresponding proportion who chose television.

The Believability of Advertising Within Each Medium*

The first question asked each respondent to indicate, on a 5-point scale, how believable they considered the advertising in each of five media: newspapers, magazines, radio, television and direct mail.

Newspapers are clearly the medium with the most believable advertising, as Table 3 demonstrates. The advertising in newspapers was rated as either very believable or believable by twice as many respondents as was the advertising on television, 68% to 34%.

Among the demographic segments often considered as special target audiences for advertisers (see Table 4)**, newspaper advertising is found to be even more believable. The advertising in newspapers is found to be either very believable or believable by 70% or more of the respondents between 25 and 44 years of age, those with at least some college education, those with incomes greater than or equal to $20,000, and those in professional or managerial occupations. It may be of particular interest that among employed females, many of whom are earning the

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* The exact wording of each question asked in the survey can be found in the appendix of this report.

** The complete tables with all demographic breakdowns appear in the appendix.

Table 3

Believability of Advertising in 5 Media

	Newspapers	Magazines	Radio	Television	Direct Mail
Very Unbelievable	1%	2%	1%	8%	12%
Unbelievable	13	21	17	36	41
Neither believable nor unbelievable	15	18	17	19	17
Believable	63	49	56	31	24
Very Believable	5	3	3	3	1
Don't Know	3	7	6	3	5
	100%	100%	100%	100%	100%
(Believable & Very Believable)	68%	52%	59%	34%	25%
Rank of Medium	1	3	2	4	5

(Total No. of Respondents: 1001)

Source: ORC Caravan Express, August 1981

the second income in two-income families, 71% rated newspapers as either believable or very believable. Single respondents and 18 - 24 year olds gave newspapers their highest rating--80%.

Table 4

Believability*
By Selected Demographics

	Newspapers	Magazines	Radio	Television	Direct Mail	Believability Index**
TOTAL PUBLIC	68%	52%	59%	34%	25%	200
AGE						
18 - 24	80	54	61	35	32	229
25 - 34	76	62	72	40	29	190
35 - 44	71	52	63	29	20	245
EDUCATION						
Some college	71	58	55	31	20	229
College graduate	70	57	56	28	22	250
INCOME						
$20-25,000	75	58	60	34	30	221
$25,000 +	73	63	60	37	22	197
$35,000 +	75	61	58	34	13	221
EMPLOYED						
Female	71	54	60	35	30	203
OCCUPATION						
Professional/Mgr.	73	57	59	29	24	252
MARITAL STATUS						
Single	80	61	61	32	32	250

Source: ORC Caravan Express, August 1981

* Believability is defined as answering the first question with either "very believable" or "believable".

** In the Believability Index, the ratio of newspaper-to-television is shown, where the proportion rating television as believable equals 100.

In almost all of these demographic groups the newspaper-to-television Believability Index value is either 200 or higher. Among college graduates, singles, and those in professional or managerial occupations, the index value climbs to at least 250. Only in the 25 - 34 year old segment does the index value drop below the 200 mark, and only insignificantly for them.

The above figures concern "preferred" demographic segments. However, newspapers did extremely well in other demographic segments as well. For instance, skilled blue collar workers gave newspapers a 77% believability rating, the highest rating of all occupational categories.

The Believability of Advertising Across Media

Each respondent was also asked to select the one most believable advertising medium. Again, newspapers are by far the most believable medium, selected by 42% of the respondents. The number of respondents selecting newspapers as the single most believable advertising medium was 62% higher than the number of respondents selecting television.

Table 5

Most Believable Medium

	Percent Selecting Medium	Rank of Medium
Newspapers	42%	1
Magazines	11	3.5
Radio	11	3.5
Television	26	2
Direct Mail	5	5
All about equal	2	
No opinion	3	
	100%	

(Total No. of Respondents: 1001)
Source: ORC Caravan Express, August 1981

Among the target demographic segments discussed in the preceding section, newspapers were selected as the most believable medium to a greater degree than by the total public, except for the 25 - 34 year old group (which selected newspapers at the average rate). Among college graduates, those in professional, managerial or other white collar occupations, those living in the NE region of the country, and those with an income of $35,000 or more, more than half selected newspapers as the most believable advertising medium. Almost half of all working women in the sample (49%) chose newspapers as the most believable advertising medium.

The overall newspaper-to-television Most Believable Index value was 162. Each of the target demographic segments had a higher index value than the total public. All three upscale segments discussed above ($35,000+, professional/managerial, college graduate) had an index value that exceeded 275.

The rise of television to second place here, compared to fourth place in the previous question, is not as inconsistent as it may seem at first. This result may be due to the forced-choice method used in the second question. A respondent selecting newspapers as most believable could not also select magazines or any other medium as most believable.

Table 6

Most Believable Medium
By Selected Demographics

	Newspapers	Magazines	Radio	Television	Direct Mail	Most Believable Index*
TOTAL PUBLIC	42%	11%	11%	26%	5%	162
AGE						
18 - 24	46	9	14	26	5	177
25 - 34	42	11	15	21	8	200
35 - 44	44	9	10	27	5	163
EDUCATION						
Some college	45	16	7	25	6	180
College graduate	52	11	10	18	3	289
INCOME						
$20-25,000	45	12	11	25	4	180
$25,000 +	47	13	10	23	3	204
$35,000 +	53	13	8	19	2	279
EMPLOYED						
Female	49	10	9	25	2	196
OCCUPATION						
Professional/Mgr.	52	15	9	18	2	289
MARITAL STATUS						
Single	48	12	11	21	7	229

Source: ORC Caravan Express, August 1981

* In the Most Believable Index, % selecting television=100.

This explanation is supported by comparing the overall believability of print versus broadcast media in the two questions. In the first question, the print media were rated as either believable or very believable 1.3 times as often as the broadcast media. In the second question, the print media were selected as most believable 1.4 times as often as the broadcast media. The comparable index values of print to broadcast for the two questions are 129 and 143 respectively.

The only comparative findings that deal with both believability questions appear in a proprietary study conducted by Management Horizons on advertising credibility.* Their results seem to be consistent with the data presented in this report.

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*Authors: Robert L. Anderson and Alice L. Rodgers (1980)

Conclusions

In both questions, newspapers were rated as the most believable of the five advertising media. They were rated as more believable than either magazines or direct mail in every demographic segment. Newspapers were also rated as more believable than radio by every demographic segment except the formerly married respondents who rate them almost equally believable.

Newspapers also performed extremely well compared to television. In both question, for the sample as a whole, the advertising in newspapers was rated as significantly more believable than the advertising on television ($p<.05$). This is also the case when the sample is broken down into demographic segments. Virtually every demographic segment in both questions rated the advertising in newspapers as significantly more believable than the advertising on television.

The long term implications for newspaper advertising appear to be quite promising. The 25 - 34 year old respondents rated newspapers as significantly more believable than television, even though they were the first generation to be raised with television as a pervasive influence. For this group, the Most Believable Index value was 200, which was the highest value for any age group.

This age group accounts for 23% of the adult population (18 years of age or older). They comprise the heart of the baby-boom generation, currently one of the most sought-after segments of the population by marketers and advertisers. The influence of this group on consumption expenditures is sure to be felt for a very long time.

Over the years, the environment for advertising messages may have deteriorated. If so, then the credibility of the medium that carries advertisers' messages is more crucial today than ever before. High believability for the medium gives any advertising message a better chance of being perceived as believable. Newspapers can provide the credibility to give advertisements a fighting chance against growing consumer skepticism.

This advantage of using newspapers as an advertising medium is particularly important for upscale consumers. The 1974 4A's study found that respondents with high income and college educations were the least favorable towards advertising as an institution. These groups were among the most favorable towards newspapers in both questions asked in the current survey. The believability of newspaper advertising is very high in general and higher still among such key demographic segments.

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BELIEVABILITY OF ADVERTISING IN NEWSPAPERS: DEMOGRAPHIC BREAKDOWNS

1. VERY UNBELIEVABLE
2. UNBELIEVABLE
3. NEITHER
4. BELIEVABLE
5. VERY BELIEVABLE
6. DON'T KNOW

	PERCENTAGE BASE UNWTD	WTD	1.	2.	3.	4.	5.	6.
TOTAL PUBLIC	1001	4669	1	13	15	63	5	3
HEAD OF HOUSEHOLD	870	4037	2	13	15	63	4	3
MALE HEAD OF HOUSEHOLD	443	1986	1	11	16	65	5	2
FEMALE HEAD OF HOUSEHOLD	427	2051	2	15	13	61	3	4
MALE	500	2266	1	11	15	65	6	2
FEMALE	501	2402	2	15	15	62	3	3
18 - 24 YEARS OF AGE	159	895	2	6	12	70	10	*
25 - 34	265	1087	1	11	11	70	5	1
35 - 44	176	881	1	11	16	69	2	1
45 - 54	158	707	1	16	19	53	6	5
55 - 64	140	689	1	18	13	63	2	3
65 OR OLDER	100	601	4	19	23	46	1	7
HIGH SCHOOL INCOMPLETE	189	1228	3	18	15	56	3	5
HIGH SCHOOL GRADUATE	356	1671	1	13	13	65	7	1
COLLEGE INCOMPLETE	199	827	2	10	15	67	4	2
COLLEGE GRADUATE	202	943	1	8	18	66	4	3
UNDER $10,000 HOUSEHOLD INCOME	153	1322	1	14	14	63	4	4
$10,000 - $14,999	139	848	4	15	21	52	6	2
$15,000 - $19,999	111	543	0	15	15	66	4	0
$20,000 - $24,999	126	624	0	9	12	72	3	4
$25,000 OR MORE	355	1258	2	10	14	67	5	1
$35,000 OR MORE	131	452	1	6	17	73	3	1
NORTHEAST	224	956	1	11	14	65	7	2
NORTH CENTRAL	263	1259	*	10	13	69	5	3
SOUTH	320	1574	3	12	16	60	5	4
WEST	194	884	1	19	17	58	4	1
WHITE	861	3500	1	12	16	63	5	3
BLACK	107	607	3	16	6	68	6	1
EMPLOYED	662	2895	1	11	14	66	6	2
EMPLOYED FEMALE	251	1143	1	12	12	67	4	4
NOT EMPLOYED	339	1774	2	15	16	59	4	4
NOT EMPLOYED FEMALE	250	1259	2	18	17	57	3	3
PROFESSIONAL/MANAGER/OWNER	246	925	1	8	15	68	5	3
WHITE COLLAR - SALES/CLERICAL	141	605	1	13	15	64	5	1
BLUE COLLAR - SKILLED	111	522	2	11	10	71	6	0
BLUE COLLAR - SEMI/UNSKILLED	136	809	1	12	16	62	5	3
SINGLE	191	594	1	8	10	71	9	1
MARRIED	658	2860	2	14	14	63	4	3
OTHER	146	793	3	14	23	54	1	5
HOUSEHOLD OF 1 OR 2 PEOPLE	432	2161	2	14	16	62	2	4
3 OR 4 PEOPLE	439	1920	2	12	14	63	9	1
5 OR MORE PEOPLE	122	554	0	9	16	67	6	2
NO CHILDREN IN HOUSEHOLD	559	2732	1	14	16	62	3	4
CHILDREN UNDER 12	316	1271	2	12	14	64	7	1
CHILDREN 12 - 17	195	900	2	11	14	66	5	2
URBAN	302	1440	1	11	13	70	3	2
SUBURBAN	420	1816	1	14	15	61	6	3
RURAL	265	1248	2	13	18	59	5	3

Table 8

BELIEVABILITY OF ADVERTISING IN MAGAZINES: DEMOGRAPHIC BREAKDOWNS

1. VERY UNBELIEVABLE
2. UNBELIEVABLE
3. NEITHER
4. BELIEVABLE
5. VERY BELIEVABLE
6. DON'T KNOW

	PERCENTAGE BASE UNWTD	PERCENTAGE BASE WTD	1.	2.	3.	4.	5.	6.
TOTAL PUBLIC	1001	4669	2	21	18	49	3	7
HEAD OF HOUSEHOLD	870	4037	2	21	19	49	2	7
MALE HEAD OF HOUSEHOLD	443	1986	2	21	19	52	2	4
FEMALE HEAD OF HOUSEHOLD	427	2051	2	22	18	47	2	9
MALE	500	2266	2	20	19	52	3	4
FEMALE	501	2402	2	21	18	47	3	9
18 - 24 YEARS OF AGE	159	895	5	24	17	51	3	*
25 - 34	265	1097	2	20	13	58	4	3
35 - 44	176	681	2	17	25	51	1	4
45 - 54	158	707	3	19	24	40	3	11
55 - 64	140	689	1	22	13	52	2	10
65 OR OLDER	100	601	1	23	21	37	2	16
HIGH SCHOOL INCOMPLETE	184	1228	2	28	16	37	1	16
HIGH SCHOOL GRADUATE	356	1671	2	20	18	54	3	3
COLLEGE INCOMPLETE	199	827	3	16	19	56	2	4
COLLEGE GRADUATE	262	943	1	18	21	52	5	3
UNDER $10,000 HOUSEHOLD INCOME	153	1322	1	26	19	42	1	11
$10,000 - $14,999	139	648	5	18	25	46	4	2
$15,000 - $19,999	111	543	1	29	18	42	3	7
$20,000 - $24,999	126	624	1	19	17	55	3	5
$25,000 OR MORE	355	1258	2	15	16	60	3	4
$35,000 OR MORE	131	452	1	17	18	59	2	3
NORTHEAST	224	556	2	18	15	54	4	7
NORTH CENTRAL	263	1255	1	17	19	56	3	4
SOUTH	320	1574	3	26	18	40	3	10
WEST	194	684	2	19	21	52	2	4
WHITE	861	3500	2	20	19	49	3	7
BLACK	107	607	2	23	13	54	4	4
EMPLOYED	662	2895	2	19	18	53	3	5
EMPLOYED FEMALE	251	1143	2	17	19	50	4	8
NOT EMPLOYED	335	1774	2	24	19	44	2	9
NOT EMPLOYED FEMALE	250	1259	3	24	18	44	1	10
PROFESSIONAL/MANAGER/OWNER	246	525	1	18	19	54	3	5
WHITE COLLAR - SALES/CLERICAL	141	605	3	15	24	51	4	3
BLUE COLLAR - SKILLED	111	522	1	20	15	57	4	3
BLUE COLLAR - SEMI/UNSKILLED	156	805	3	20	16	48	4	9
SINGLE	191	594	4	16	16	57	4	3
MARRIED	658	2860	2	23	18	48	3	6
OTHER	146	793	1	17	24	46	*	12
HOUSEHOLD OF 1 OR 2 PEOPLE	432	2161	1	21	19	50	1	8
3 OR 4 PEOPLE	439	1520	4	22	17	48	4	5
5 OR MORE PEOPLE	122	554	*	15	21	53	4	7
NO CHILDREN IN HOUSEHOLD	559	2732	2	21	18	49	2	8
CHILDREN UNDER 12	316	1271	2	21	16	52	4	5
CHILDREN 12 - 17	195	900	3	16	23	49	3	6
URBAN	302	1440	2	21	14	55	2	6
SUBURBAN	420	1616	1	17	22	48	5	7
RURAL	265	1248	3	26	18	45	1	7

Table 9

BELIEVABILITY OF ADVERTISING ON RADIO:
DEMOGRAPHIC BREAKDOWNS

1. VERY UNBELIEVABLE
2. UNBELIEVABLE
3. NEITHER
4. BELIEVABLE
5. VERY BELIEVABLE
6. DON'T KNOW

	PERCENTAGE BASE UNWTD	PERCENTAGE BASE WTD	1.	2.	3.	4.	5.	6.
TOTAL PUBLIC	1001	4665	1	17	17	56	3	6
HEAD OF HOUSEHOLD	870	4037	1	16	18	56	3	6
MALE HEAD OF HOUSEHOLD	443	1986	2	17	17	57	3	4
FEMALE HEAD OF HOUSEHOLD	427	2051	1	16	20	54	2	7
MALE	500	2266	2	18	16	56	4	4
FEMALE	501	2402	1	16	18	55	3	7
18 - 24 YEARS OF AGE	159	895	2	20	16	56	5	1
25 - 34	265	1087	1	13	13	70	2	1
35 - 44	176	881	2	14	18	60	3	3
45 - 54	158	707	1	11	24	50	5	9
55 - 64	140	689	1	20	15	54	1	9
65 OR OLDER	100	601	2	27	22	31	3	15
HIGH SCHOOL INCOMPLETE	184	1228	1	17	18	55	1	8
HIGH SCHOOL GRADUATE	356	1671	1	17	14	60	4	4
COLLEGE INCOMPLETE	199	827	2	19	20	53	2	4
COLLEGE GRADUATE	262	943	1	17	21	51	5	6
UNDER $10,000 HOUSEHOLD INCOME	153	1322	1	20	15	53	3	8
$10,000 - $14,999	139	648	4	15	20	53	4	4
$15,000 - $19,999	111	543	0	15	16	62	4	3
$20,000 - $24,999	126	624	0	17	17	59	1	6
$25,000 OR MORE	355	1258	2	15	19	56	4	4
$35,000 OR MORE	131	452	3	14	22	55	3	3
NORTHEAST	224	956	0	18	17	54	6	5
NORTH CENTRAL	263	1255	1	15	17	59	3	5
SOUTH	320	1574	2	17	16	54	2	9
WEST	194	884	1	18	21	55	3	2
WHITE	861	3900	1	18	18	54	3	6
BLACK	107	607	0	14	11	66	6	3
EMPLOYED	662	2895	1	15	17	60	3	4
EMPLOYED FEMALE	251	1143	1	16	19	58	2	4
NOT EMPLOYED	339	1774	1	19	18	49	4	9
NOT EMPLOYED FEMALE	250	1259	1	15	19	53	3	9
PROFESSIONAL/MANAGER/OWNER	246	925	2	16	19	55	4	4
WHITE COLLAR - SALES/CLERICAL	141	605	2	16	16	63	1	2
BLUE COLLAR - SKILLED	111	522	1	16	12	65	5	1
BLUE COLLAR - SEMI/UNSKILLED	156	605	1	15	19	57	2	6
SINGLE	191	994	1	20	14	57	4	4
MARRIED	658	2860	1	16	18	56	3	6
OTHER	146	793	0	18	19	51	5	7
HOUSEHOLD OF 1 OR 2 PEOPLE	432	2161	1	19	18	51	3	9
3 OR 4 PEOPLE	439	1920	2	16	17	58	5	2
5 OR MORE PEOPLE	122	554	*	14	18	62	2	4
NO CHILDREN IN HOUSEHOLD	559	2732	1	19	17	52	3	8
CHILDREN UNDER 12	316	1371	1	14	17	62	4	2
CHILDREN 12 - 17	195	900	2	14	18	60	4	2
URBAN	302	1440	1	17	15	59	5	3
SUBURBAN	420	1816	2	17	20	51	3	8
RURAL	265	1348	1	17	17	58	2	5

Table 10

BELIEVABILITY OF ADVERTISING ON TELEVISION:
DEMOGRAPHIC BREAKDOWNS

1. VERY UNBELIEVABLE
2. UNBELIEVABLE
3. NEITHER
4. BELIEVABLE
5. VERY BELIEVABLE
6. DON'T KNOW

	PERCENTAGE BASE UNWTD	WTD	1.	2.	3.	4.	5.	6.
TOTAL PUBLIC	1001	4669	8	36	19	31	3	3
HEAD OF HOUSEHOLD	870	4037	8	36	20	31	2	3
MALE HEAD OF HOUSEHOLD	443	1986	9	35	22	29	3	2
FEMALE HEAD OF HOUSEHOLD	427	2051	7	37	18	32	2	4
MALE	500	2246	9	35	22	30	4	1
FEMALE	501	2402	7	37	17	33	2	4
18 - 24 YEARS OF AGE	159	895	9	39	16	31	4	1
25 - 34	205	1087	8	32	18	37	3	2
35 - 44	176	681	9	36	24	26	3	2
45 - 54	158	707	7	30	25	32	3	3
55 - 64	140	685	5	42	17	31	2	3
65 OR OLDER	100	601	8	40	17	26	2	7
HIGH SCHOOL INCOMPLETE	184	1228	4	32	21	38	2	3
HIGH SCHOOL GRADUATE	356	1671	9	38	16	32	3	2
COLLEGE INCOMPLETE	199	827	11	35	21	28	3	2
COLLEGE GRADUATE	262	943	9	38	21	24	4	4
UNDER $10,000 HOUSEHOLD INCOME	153	1322	6	36	18	35	2	3
$10,000 - $14,999	135	648	7	42	21	22	6	2
$15,000 - $19,999	111	643	12	37	18	29	2	2
$20,000 - $24,999	126	524	6	34	22	32	2	4
$25,000 OR MORE	355	1258	8	34	19	34	3	2
$35,000 OR MORE	131	452	10	31	24	31	3	1
NORTHEAST	224	556	8	44	20	22	2	4
NORTH CENTRAL	263	1255	9	35	17	33	3	3
SOUTH	320	1574	6	34	19	34	4	3
WEST	194	884	10	33	21	34	1	1
WHITE	861	3900	8	37	19	30	3	3
BLACK	107	607	1	34	16	40	5	4
EMPLOYED	662	2895	9	34	20	32	3	2
EMPLOYED FEMALE	251	1143	8	38	16	32	3	3
NOT EMPLOYED	339	1774	6	40	18	30	2	4
NOT EMPLOYED FEMALE	250	1259	5	36	18	34	2	5
PROFESSIONAL/MANAGER/OWNER	246	925	7	39	21	26	3	4
WHITE COLLAR - SALES/CLERICAL	141	605	11	32	21	35	0	1
BLUE COLLAR - SKILLED	111	522	9	29	18	41	6	1
BLUE COLLAR - SEMI/UNSKILLED	156	805	11	34	19	30	4	2
SINGLE	191	594	6	40	19	28	4	3
MARRIED	658	2860	8	36	19	32	3	2
OTHER	146	793	6	32	22	33	2	5
HOUSEHOLD OF 1 OR 2 PEOPLE	432	2161	7	36	20	31	2	4
3 OR 4 PEOPLE	439	1920	10	38	18	30	3	1
5 OR MORE PEOPLE	122	554	3	31	21	37	6	2
NO CHILDREN IN HOUSEHOLD	559	2732	8	37	19	30	2	4
CHILDREN UNDER 12	316	1271	8	35	17	34	4	2
CHILDREN 12 - 17	195	900	4	33	23	35	4	1
URBAN	302	1498	7	39	18	34	3	3
SUBURBAN	420	1616	8	38	20	27	4	3
RURAL	265	1348	8	36	19	34	2	1

Table 11

BELIEVABILITY OF ADVERTISING BY DIRECT MAIL: DEMOGRAPHIC BREAKDOWNS

1. VERY UNBELIEVABLE
2. UNBELIEVABLE
3. NEITHER
4. BELIEVABLE
5. VERY BELIEVABLE
6. DON'T KNOW

	PERCENTAGE BASE UNWTD	WTD	1.	2.	3.	4.	5.	6.
TOTAL PUBLIC	1001	4669	12	41	17	24	1	5
HEAD OF HOUSEHOLD	870	4037	12	42	16	23	1	6
MALE HEAD OF HOUSEHOLD	443	1986	15	43	17	20	1	4
FEMALE HEAD OF HOUSEHOLD	427	2051	9	41	16	26	1	7
MALE	500	2266	14	41	17	22	2	4
FEMALE	501	2402	9	40	16	27	1	7
18 - 24 YEARS OF AGE	159	895	12	41	14	29	3	1
25 - 34	265	1087	11	42	17	27	2	1
35 - 44	176	681	13	42	21	20	*	4
45 - 54	158	707	6	41	19	20	1	13
55 - 64	140	689	8	43	14	27	0	9
65 OR OLDER	100	601	21	33	15	20	0	11
HIGH SCHOOL INCOMPLETE	184	1228	7	41	13	27	1	11
HIGH SCHOOL GRADUATE	356	1671	13	40	15	29	1	3
COLLEGE INCOMPLETE	199	827	13	43	22	18	2	2
COLLEGE GRADUATE	262	943	15	39	20	21	1	4
UNDER $10,000 HOUSEHOLD INCOME	153	1322	10	39	14	28	1	3
$10,000 - $14,999	139	646	14	40	17	24	2	3
$15,000 - $19,999	111	543	17	44	14	23	0	5
$20,000 - $24,999	126	624	7	36	20	30	0	7
$25,000 OR MORE	355	1258	12	43	19	20	2	4
$35,000 OR MORE	131	452	13	44	25	11	2	5
NORTHEAST	224	956	9	49	15	23	0	4
NORTH CENTRAL	263	1255	12	37	17	25	2	6
SOUTH	320	1574	11	38	16	25	2	8
WEST	194	884	14	43	18	23	0	2
WHITE	861	3900	13	41	17	22	1	6
BLACK	107	607	4	38	12	42	0	4
EMPLOYED	662	2895	11	42	17	25	1	4
EMPLOYED FEMALE	251	1143	7	42	17	29	1	4
NOT EMPLOYED	339	1774	13	38	15	24	1	9
NOT EMPLOYED FEMALE	250	1259	11	39	15	25	1	9
PROFESSIONAL/MANAGER/OWNER	246	925	14	40	19	23	1	3
WHITE COLLAR - SALES/CLERICAL	141	605	9	45	22	20	*	4
BLUE COLLAR - SKILLED	111	522	10	39	14	32	3	2
BLUE COLLAR - SEMI/UNSKILLED	156	605	10	44	15	26	1	4
SINGLE	191	994	10	40	16	29	3	2
MARRIED	658	2860	13	41	18	22	1	5
OTHER	146	793	10	39	15	26	*	10
HOUSEHOLD OF 1 OR 2 PEOPLE	432	2161	14	39	16	24	*	7
3 OR 4 PEOPLE	439	1520	10	42	17	25	2	4
5 OR MORE PEOPLE	122	954	9	44	19	24	1	3
NO CHILDREN IN HOUSEHOLD	559	2732	13	41	16	23	0	7
CHILDREN UNDER 12	316	1271	10	40	18	29	2	3
CHILDREN 12 - 17	195	900	8	42	20	25	2	3
URBAN	302	1440	15	40	16	23	1	5
SUBURBAN	420	1816	11	43	17	22	1	6
RURAL	265	1348	9	38	17	29	1	6

Table 12

MOST BELIEVABLE ADVERTISING MEDIUM:
DEMOGRAPHIC BREAKDOWNS

1. DIRECT MAIL
2. NEWSPAPERS
3. TELEVISION
4. RADIO
5. MAGAZINES
6. ALL MEDIA ABOUT EQUALLY BELIEVABLE
7. NO OPINION

	PERCENTAGE BASE UNWTD	PERCENTAGE BASE WTD	1.	2.	3.	4.	5.	6.	7.
TOTAL PUBLIC	1031	4669	5	42	25	11	11	2	3
HEAD OF HOUSEHOLD	870	4237	5	41	26	11	12	2	3
MALE HEAD OF HOUSEHOLD	443	1586	4	42	25	11	14	2	2
FEMALE HEAD OF HOUSEHOLD	427	2651	6	41	28	11	9	2	4
MALE	530	2266	5	43	25	11	13	2	2
FEMALE	501	2402	6	41	28	11	10	2	3
18 - 24 YEARS OF AGE	159	695	5	46	25	14	9	0	0
25 - 34	265	1047	8	42	21	15	11	2	1
35 - 44	176	681	5	44	27	10	9	3	3
45 - 54	158	737	2	44	35	7	9	3	3
55 - 64	140	689	5	42	25	7	14	2	4
65 OR OLDER	100	601	6	32	26	11	13	4	8
HIGH SCHOOL INCOMPLETE	144	1228	9	30	37	11	7	1	5
HIGH SCHOOL GRADUATE	356	1673	4	43	24	14	13	1	2
COLLEGE INCOMPLETE	159	827	6	45	23	7	16	1	1
COLLEGE GRADUATE	262	943	3	52	18	10	11	3	3
UNDER $10,000 HOUSEHOLD INCOME	153	1322	8	36	32	11	8	2	4
$10,000 - $14,999	139	648	5	42	25	11	13	1	3
$15,000 - $19,999	111	543	5	43	24	13	13	1	1
$20,000 - $24,999	126	624	4	45	25	11	12	1	2
$25,000 OR MORE	358	1258	3	47	23	10	13	2	2
$35,000 OR MORE	131	452	2	53	19	8	13	5	2
NORTHEAST	224	956	3	56	17	11	10	2	2
NORTH CENTRAL	263	1255	7	41	27	9	14	1	2
SOUTH	320	1574	6	35	31	11	10	3	4
WEST	194	844	5	39	27	14	12	1	1
WHITE	861	3966	5	44	25	11	11	2	3
BLACK	107	607	9	32	36	10	9	2	3
EMPLOYED	662	2895	3	46	25	11	12	2	2
EMPLOYED FEMALE	251	1143	2	49	25	9	10	2	3
NOT EMPLOYED	339	1774	9	35	29	11	10	1	4
NOT EMPLOYED FEMALE	250	1259	10	33	30	13	10	1	3
PROFESSIONAL/MANAGER/OWNER	246	928	2	52	18	9	15	2	2
WHITE COLLAR - SALES/CLERICAL	141	605	1	50	27	8	11	1	2
BLUE COLLAR - SKILLED	111	522	4	43	28	14	12	0	1
BLUE COLLAR - SEMI/UNSKILLED	156	805	4	39	27	14	11	3	2
SINGLE	191	594	7	48	21	11	12	0	1
MARRIED	658	2760	6	40	27	12	12	2	3
OTHER	146	793	3	42	32	8	10	1	4
HOUSEHOLD OF 1 OR 2 PEOPLE	432	2161	4	42	26	9	13	2	4
3 OR 4 PEOPLE	439	1520	7	43	26	13	8	2	1
5 OR MORE PEOPLE	122	554	4	46	27	10	17	2	2
NO CHILDREN IN HOUSEHOLD	559	2232	5	43	25	10	13	1	4
CHILDREN UNDER 12	316	1571	7	40	26	13	10	2	2
CHILDREN 12 - 17	195	906	5	44	29	10	10	1	2
URBAN	302	1440	5	42	26	13	11	2	3
SUBURBAN	420	1616	7	44	24	9	13	1	3
RURAL	265	1348	4	46	29	12	10	2	3

Table 13

NEWSPAPER READERSHIP IN PAST FIVE WEEKDAYS:
DEMOGRAPHIC BREAKDOWNS

1. 5 DAYS
2. 4 DAYS
3. 3 DAYS
4. 2 DAYS
5. 1 DAY
6. 0 DAYS
7. DON'T KNOW

	PERCENTAGE BASE UNWTD	WTD	1.	2.	3.	4.	5.	6.	7.
TOTAL PUBLIC	1001	4665	64	6	10	6	7	7	*
HEAD OF HOUSEHOLD	870	4037	65	6	9	7	6	7	*
MALE HEAD OF HOUSEHOLD	443	1586	66	7	9	6	6	6	*
FEMALE HEAD OF HOUSEHOLD	427	2051	64	5	8	7	7	9	*
MALE	500	2266	65	7	9	6	6	6	1
FEMALE	501	2402	62	5	11	6	7	9	*
18 - 24 YEARS OF AGE	159	895	43	10	23	6	8	10	*
25 - 34	265	1087	53	10	12	9	9	7	0
35 - 44	176	681	65	8	7	7	9	4	0
45 - 54	152	707	71	1	7	5	7	7	2
55 - 64	143	689	80	4	5	5	1	5	0
65 OR OLDER	100	661	84	1	1	3	2	9	0
HIGH SCHOOL INCOMPLETE	184	1228	54	6	8	9	8	14	1
HIGH SCHOOL GRADUATE	356	1671	62	6	12	7	8	5	*
COLLEGE INCOMPLETE	199	827	67	7	14	5	3	4	0
COLLEGE GRADUATE	262	943	76	5	7	3	4	5	0
UNDER $10,000 HOUSEHOLD INCOME	153	132[illegible]	56	4	12	8	8	11	1
$10,000 - $14,999	139	648	56	8	9	9	9	9	0
$15,000 - $19,999	111	543	60	7	11	7	9	5	1
$20,000 - $24,999	126	629	63	8	12	6	6	5	0
$25,000 OR MORE	355	12[illegible]	77	7	8	4	2	2	0
$35,000 OR MORE	131	452	83	8	3	3	1	2	0
NORTHEAST	224	556	67	7	8	7	4	6	1
NORTH CENTRAL	263	1255	66	8	7	5	6	8	0
SOUTH	320	1574	60	4	11	8	8	8	1
WEST	194	884	62	9	14	3	7	5	0
WHITE	861	3506	64	5	10	7	6	8	*
BLACK	107	607	62	7	12	6	8	4	1
EMPLOYED	662	2895	61	8	11	7	6	6	1
EMPLOYED FEMALE	251	1143	54	7	13	7	9	10	*
NOT EMPLOYED	335	1774	67	4	8	6	7	8	0
NOT EMPLOYED FEMALE	250	1259	69	4	8	5	6	8	0
PROFESSIONAL/MANAGER/OWNER	246	525	72	4	8	4	7	5	0
WHITE COLLAR - SALES/CLERICAL	141	608	59	10	14	5	4	7	1
BLUE COLLAR - SKILLED	111	522	58	13	11	8	5	5	0
BLUE COLLAR - SEMI/UNSKILLED	156	805	51	6	13	10	9	9	2
SINGLE	191	594	52	9	20	5	8	6	0
MARRIED	658	2860	68	6	6	7	6	7	0
OTHER	146	793	62	5	10	7	4	10	2
HOUSEHOLD OF 1 OR 2 PEOPLE	432	2161	65	6	9	6	5	8	1
3 OR 4 PEOPLE	435	1520	61	8	10	8	7	6	0
5 OR MORE PEOPLE	122	554	66	5	13	2	7	7	0
NO CHILDREN IN HOUSEHOLD	559	2732	65	6	9	7	5	7	1
CHILDREN UNDER 12	316	1371	57	7	12	6	9	9	0
CHILDREN 12 - 17	195	906	67	4	12	3	7	7	0
URBAN	302	1400	69	6	8	6	7	4	0
SUBURBAN	420	1116	65	7	8	7	5	8	0
RURAL	265	1348	55	6	14	6	9	9	1

SECTION N

Now, a different topic —

N1. All the major media - TV, radio, newspapers, magazines and direct mail - carry advertising. As I read off each of the media, please tell me, for each one, whether you consider the advertising in this medium as very unbelievable, unbelievable, neither believable nor unbelievable, believable, or very believable.

	VERY UNBELIEVABLE	UNBELIEVABLE	NEITHER	BELIEVABLE	VERY BELIEVABLE	DK
a. Newspapers	1	2	3	4	5	6
b. Magazines	1	2	3	4	5	6
c. Radio	1	2	3	4	5	6
d. Television	1	2	3	4	5	6
e. Direct Mail	1	2	3	4	5	6

N2. Which of these five media would you say has the most believable advertising? Is it (READ LIST)....

1...Direct mail
2...Newspapers
3...Television
4...Radio, or
5...Magazines
(DO NOT READ) 6...All media about equally believable
(DO NOT READ) 7...No opinion

N3. How many days in the past five weekdays did you read or look at a daily newspaper? (DO NOT READ LIST.)

1 5 DAYS
2 4 DAYS
3 3 DAYS
4 2 DAYS
5 1 DAY
6 0 DAYS
7 DON'T KNOW

METHODOLOGICAL NOTE

The following tables are provided for the reader who is interested in obtaining a quick estimate either of the stability of a given percentage or of the significance of the difference between two percentages.

Confidence Intervals for a Given Percentage
(at the 95% confidence level)

N	Reported Percentage				
(Base for %)	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	2.6	3.5	4.0	4.3	4.4
250	3.7	5.0	5.7	6.1	6.2
200	4.2	5.5	6.3	6.8	6.9
150	4.8	6.4	7.3	7.8	8.0
100	5.9	7.8	9.0	9.6	9.8
50	8.3	11.1	12.7	11.6	13.9
25	11.8	15.7	18.0	19.2	19.6

Example: If a report shows that 20% of all respondents (when N = 500) answer in a particular way, the chances are about 95 out of 100 that the true value is 20% + or - 3.5%, that is, that the range 23.5% - 16.5% contains the true value.

Significance of Differences Between Percentages
(95% confidence level)

Average of the Bases of Percentages Being Compared	Average of Reported Percentages				
	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	3.7	4.9	5.7	6.1	6.2
250	5.2	7.1	8.1	8.6	8.8
200	5.9	7.8	8.9	9.6	9.8
150	6.8	9.1	10.3	11.0	11.3
100	8.3	11.0	12.7	13.6	13.9
50	11.7	15.7	18.0	19.2	19.7
25	16.7	22.2	25.5	27.2	27.7

Example: A report shows that 33% of all respondents from 30 to 39 years of age use a certain product and that only 27% of all respondents in the 40-to-49 age group use that product. Could this difference be due to chance?

In this example assume an average base of 500 for the represented percentages. The average of the percentages (33 + 27) equals 30% and the difference between the percentages is 6%.

Since 6% is greater than 5.7 (the figure in the table for this base and percentage) the chances are about 95 out of 100 that the product is used more by the 30-39 age group.

The table values are based on an assumption of simple random sampling. The figures may be too large if a stratified sampling technique was used and probably are too small if a cluster sampling technique was utilized. (For formulas used, see McNemar, Psychological Statistics, pages 54, 60.) The second table should be used with extreme caution if the bases being averaged are very different.

A 8600 - 8.2
11/81

Research Report

[redacted]

Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

MOVIE-GOING IN THE UNITED STATES AND CANADA

October, 1981

Newspaper Advertising Bureau, Inc., 485 Lexington Avenue, New York, N.Y. 10017

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper industry and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

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Study Highlights

I. Changes in Movie-Going: 1973-1981

Movie-going is still popular in the U.S. and Canada. Nearly half of all moviegoers go at least once a month.

In 1973, 39 percent of the moviegoers in the U.S. went to the movies at least once a month, and in 1981, 47 percent went at least once a month.

While movie admissions wax and wane the overall trend since 1971 is upward.

Compared with 1973, the number of moviegoers who never attend on Monday or Tuesday but would if tickets were half price, rose nearly 20%.

As the baby boom generation matures, the percent of 18-29 year olds who are frequent moviegoers has declined by 15% since 1973, while those moviegoers over 30 have increased their share of the frequent movie attender category by 15%.

Moviegoers have become more careful and deliberate in planning a movie outing since 1973.

Moviegoers are looking at newspaper movie advertisements more often now than in 1973.

There has been a change in the percent of U.S. moviegoers who frequently or occasionally look at newspaper movie reviews, from 58 percent in 1973 to 68 percent in 1981.

II. Variations in Movie-Going

People with small children at home are typically moderate moviegoers, but they are more likely than most to want to go to the movies even more than they do now.

There is a large untapped movie market. People at every level of movie-going frequency want to go more than they do now; especially the moderate and infrequent attenders.

In the U.S. and Canada, for all ages, not enough time and money are the main reasons given for not going to the movies more often. But older adults, 35 and over cite poor film quality more often than the younger group.

All moviegoers, regardless of age, want to see more adult comedies and romances.

The younger and older moviegoers differ on the extent to which they like various special effects or vivid scenes in films; unusual space scenes, however, are liked by a majority of each age group.

Movies must be targeted to include the 25-44 age group; the fastest growing segment of the population.

III. What They Like and Dislike About Movies and Theaters

Most people agree that theaters add something to the movie experience that TV does not.

Overwhelmingly, the important features of movie theaters are that they provide no interruptions, are clean and attractive and have large screens.

80% of all moviegoers like Dolby Sound.

For moviegoers who feel theater size is important, the majority prefer a medium size theater.

About half of all moviegoers like multiplex theaters, few dislike them.

Nearly three-quarters of all moviegoers like food concessions, or think them a must.

New technologies such as cable TV and video cassette players could be a strong source of competition for movie theaters if theater owners do not maximize their own unique attractions. However, we believe these options will not supplant the theater-going experience, but will create a complementary situation where moviegoers who want to go to the movies more often are the same ones who own many of the new video options: in the U.S. and Canada, 34% have cable TV, 11% have subscription TV, and 5% own video cassette players.

IV. Movie Decision Making

Half of all moviegoers make their decision to go to the movies on the same day they go.

The majority of moviegoers, especiallv the older group, prefer to wait and see a new movie later on when theaters are less crowded or it is a more convenient time.

Moviegoing is seen as a chance to get out of the house and be with other people. Most go with a date, spouse, friends or family; very few go alone.

Moviegoers rate newspapers as the most useful medium for movie decisions.

Frequent moviegoers are more likely to recall a newspaper movie ad than a TV commercial.

About three-quarters of moviegoers look at newspaper movie advertisements: whenever they see the paper, often to see what's playing, occasionally even when not going.

70% of all moviegoers are encouraged to some degree by a positive review. Negative reviews have little to no effect.

Movie-Going in the United States and Canada

Movie-going is a popular form of entertainment in the United States and Canada. Sixty-one percent of North Americans said they had attended a movie in the past year. Nearly half (47%) of the United States sample said they go to movies at least once a month. Another 18 percent go five to six times a year. In Canada, 49 percent of a nationwide sample said they go at least once a month. In both countries, movies are considered to be a "good bargain," in these pressing economic times. In the United States only about a third (32%) said movies were not a "good bargain," compared to other forms of entertainment. Even fewer (26%) Canadians thought movies were not a "good bargain."

While movies are still a major way North Americans entertain themselves, there is a rapidly expanding challenge to the movie industry from a variety of sources that are exploiting the very latest in communication technology. Video cassettes, cable TV, and now direct satelite TV reception have the capability to deliver a first-run movie to individual homes.

The energy crunch has also made people more conscious of restricting the use of their automobiles. Might this cut into movie-going frequency?

Movie-going drops off rather sharply as young people move into their thirties. Why? Will that enormous bulge in the population pipeline called the "baby boomers," who are now approaching or are well into their thirties, follow the patterns of the past and begin to slow their movie-going?

For sure, the baby boomers' unprecedented numbers have added to the rise in movie attendance in the past decade. Now we must consider their impact on the movie industry as they and the nation get older.

These are some of the issues to be explored in this research report. We will also look at how movie-going has changed over the past eight years, what people like and dislike about movies and theaters, why they go to the movies, and how they make up their minds about films.

The Newspaper Advertising Bureau of New York has just completed a major study of movie-going, drawing nationwide samples from the United States and Canada, from which we will answer some of the questions that concern much of the movie industry. Some of the questions asked of this North American sample were asked of a nationwide (U.S.) sample in 1973, so we will be able to track some changes over time, rather than having to depend on a study fixed at one point in time. Here is how the study was done.

How the Study Was Done

R. H. Bruskin Associates was contracted to draw two nationwide samples, one from the United States and one from Canada. Both samples were from non-farm populations. The United States sample was composed of 1,005 randomly drawn people (520 females and 485 males) 18 years and older plus a supplementary sample of 345 people 18-49 (201 females and 144 males) for a total of 1350. The supplementary sample of people ages 18-49 was drawn to enhance the numerical base on which detailed analysis were done. Except when indicated all data reported here reflect the combined samples, weighted to account for the overrepresentation of those 18-49 years old.

Telephone interviews were conducted with people in the United States sample on June 12-14, 1981 and with people in the supplementary sample on June 15, 1981.

The Canadian data were obtained through telephone interviews with 205 nonfarm Canadians through a random digit dialing procedure (100 males and 105 females). The random selection of telephone exchanges was accomplished by province, providing a stratified sample representative of all telephone households. Telephone interviewing was done during July 16-23, 1981. Completed interviews were weighted to reflect the population distribution of the separate provinces.

Different samples were used at different points in this research report, so the reader should be aware of when a specific sample or samples were employed. When over-time changes are analyzed, only data from a 1973 and the 1981 United States sample were used, since no Canadian data were available in 1973, our baseline year.

Generally, when age groups (18-34 years and 35-49 years) were looked at, only United States sample were used, since we overdrew people in these age ranges to ensure a sufficiently large base.

When combined national samples from the United States and Canada are used, the sample is weighted to approximate more closely the populations and to adjust for the overrepresentation of the age group 18-49 years old.

When references are made to the United States or Canada, samples from each of these countries served as the base.

I. Changes in Movie-Going: 1973-1981

Movie-going was a pervasive means of entertainment in 1973 when 59 percent of adults said they had attended a movie in the past year. Movie-going today persists as a widespread activity. In the 1981 study, 61 percent reported seeing a movie in the past year. This of course, is not a statistically significant increase in attendance, but when more detailed data are inspected (Table 1), we find a shift in movie-going frequency that reflects a substantial increase in relatively few years (8). The changes appear to be coming from a greater frequency of movie-going among people who attended less frequently in the past.

Table 1. Frequency of Movie-Going Among Those Who Have Gone in Past Year, 1973-1981 (U.S. Only)

Movie-Going Frequency	1973	1981	Percent Change
2-3 times a month or more	19%	25%	+6
About once a month	20%	22%	+2
5-6 times a year	27%	18%	-9
Less often	34%	35%	+1
	100%	100%	
Base: Past year movie-goers	(454)	(910)	

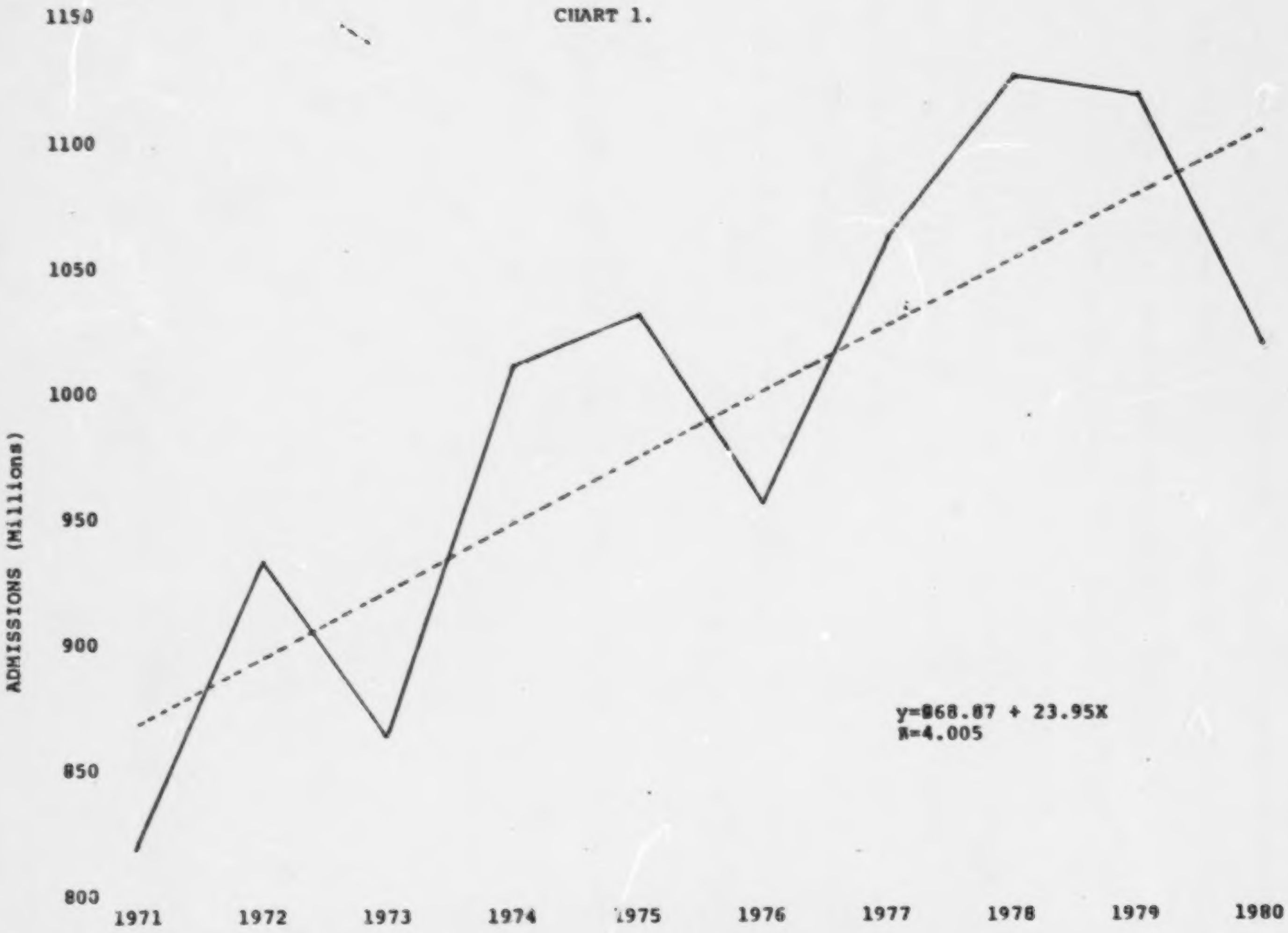
The frequency with which movie-goers see films has increased by 6 percent among the most frequent attenders (2-3 times a month or more) and by 2 percent among those going about once a month. Those going only 5-6 times a year have declined by 9 percent over the 8 year period, and the least frequent attenders have remained about the same.

Movie-going follows an erratic but upward trend, according to information on motion picture theater box office admissions (Chart 1). Starting with a low of 820 million in 1971, movie attendance has moved upward in cycles of ups and downs. The dotted line on Chart 1 represents the average of year-to-year attendance, and the calculations tell us that the actual year-to-year deviations from this line are not so great that they must be considered a random scatter. In other words, the actual year-to-year attendance forms a pattern that is moving upward toward greater attendance.

It is also of interest to note that the overall cycles of peaks and valleys become wider apart in years with each new cycle. The first cycle was from 1971 to 1973 (2 years), the next was from 1973 to 1976 (3 years), and the last was from 1976 to 1980 (4 years). If this pattern is to continue, we could expect that in the next few years, we could see movie attendance increasing again, with the between years cycle being a five year span.

While movie attendance has been increasing since 1973, 18 percent from 1973 to 1980, there have been some remarkable changes taking place over this 8 - year time span among frequent movie-goers, those who go at least 2-3 times a month.

CHART 1.



MOTION PICTURE THEATRES BOXOFFICE ATTENDANCE

Source: Motion Picture Association
of America, Inc.

Demographic Profile of Frequent Movie-Goers

In 1973, the typical frequent movie-goer was 18-29 years old (72%) high school graduate (54%), and had a moderate (35%) to low (39%) income. Today, frequent movie-goers look demographically different (Table 2). In 1981, the frequent movie-goer is still typically young (57%) but there has been a substantial increase (5% to 17%) in the percentage of frequent movie-goers who are 50 years old or older. The typical frequent movie-goer now has at least some college (48%), and an income of at least $15,000 (80%). The value of a dollar in 1973, of course, is not the same as its value today. Nevertheless, when it is considered that 38 percent of frequent movie-goers in 1981 had family incomes of $25,000 or over, the affluence of frequent movie-goers is still apparent(data not shown).

Table 2. Frequent Movie-Goers by Age, Education and Income 1973-1981 (U.S. Only)

	Frequent Movie-Goers		
	1973	1981	Percent Change
Age:			
18-29 years	72%	57%	-15
30-49 years	23%	26%	+ 3
50 & over	5%	17%	+12
	100%	100%	
Base:	(90)	(224)	
Education:			
Some H.S. or less	13%	9%	- 4
H.S. graduate	54%	43%	-11
Some college or more	33%	48%	+15
	100%	100%	
Base:	(90)	(224)	
Income:			
Under $10,000	39%	11%	-28
$10,000 - $14,999	35%	9%	-26
$15,000 & over	26%	80%	+54
	100%	100%	
Base:	(90)	(217)	

What we have here is a shift toward an older and more sophisticated movie audience that the movie industry might do well to watch closely. There may be a comparable shift in film preferences and other movie-related concerns. The aging baby boom generation, with its extraordinary numbers, will insure this trend toward an older and more sophisticated audience.

Monday/Tuesday Movie Attendance

A perennial problem for movie theaters is how to get more people in theaters on Monday and Tuesday. Apparently, from the data in Table 3, not much has changed in this problem, since about the same percentage (47% in 1973 and 45% in 1981) said they have gone to a movie on Monday or Tuesday. However, compared to 1973, theaters have a greatly improved chance now to increase attendance on these days. In 1973, over a third (35%) of those who said they had not gone to a Monday/Tuesday movie said they would go if tickets were half price. That percentage has swelled to over half (53%) in 1981; more people now are motivated by price incentives.

Table 3. Monday/Tuesday Movie Attendance, 1973-1981 (U.S. Only)

	1973	1981	Percent Change
Have gone to movie on Monday/Tuesday	47%	45%	-2
Base: Past year movie-goers	(454)	(910)	
Would go if half price	35%	53%	+18
Base: Movie-goers who never attend movie on Monday/Tuesday	(242)	(482)	

When the Movie-Going Decision is Made

How far in advance do you usually decide to go to the movies? This question was asked of national samples in 1973 and 1981. For both samples, about half said they made their movie-going decision the same day that they went. However, movie-goers in 1981 were more likely (45%) than movie-goers in 1973 (37%) to make the decision at least one day in advance. Those in 1973, on the other hand, were more prone (11% vs. 5%) to say they don't know or it varies. So, to some extent, people now are more premeditative about movie decisions.

Table 4. When Decision to go to Movies is Made, 1973-1981 (U.S. Only)

	1973	1981	Percent Change
Same day, right then	52%	50%	-2
At least one day in advance	37%	45%	+8
Don't know/it varies	11%	5%	-6
	100%	100%	
Base: Past year movie-goers	(454)	(910)	

Movie Advertisements and Reviews in Newspapers

In 1973 newspapers were a vital source of information about movies. So they are today, but some noticeable changes have taken place (Table 5). While past month's recall of seeing newspaper movie advertisements have remained unchanged at 86% over the past eight years, recall of TV commercials has increased from 78 percent in 1973 to 88 percent in 1981.

Table 5. Recall of Past Months Movie Ads and Commercials, 1973-1981
(U.S. Only)

	1973	1981	Percent Change
Recall Seeing:			
Newspaper ads	86%	86%	0
TV commercials	78%	88%	+10
Base: Past year movie-goers	(454)	(915)	

The use of newspaper advertisements goes beyond attention and recall. There is an intention to seek information in newspaper advertising that is not present in TV commercial exposure. A small proportion look at newspaper ads only when they want to go to the movies. But a large and increasing proportion try to keep track of what is playing day by day. This is consistent with the trend toward more deliberation in deciding to go to the movies. Almost everyone looks at newspaper ads at some time or another (92% in 1981; 94% in 1973) but three out of four (75%) in the

1981 study say that they look at movies ads when they read the paper (either everytime, often or occasionally). In the 1973 study, the comparable figure was 67 percent. The other side of the coin is that fewer in 1981 only look at movie ads when they want to go to the movies.

Table 6. Frequency of Looking at Movie Ads in Newspapers, 1973-1981 (U.S. Only)

	1973	1981	Percent Change
Look at Newspaper Movie Ads:	94%	92%	-2
Almost everytime, often or occasionally look to see what's playing	67%	75%	+8
Only when I want to go to the movies	27%	17%	-10
Never	6%	8%	+2
	100%	100%	
Base: Past year movie-goers	(454)	(915)	

The frequency of looking at movie reviews in newspapers has increased as well (Table 7). Movie reviews are attracting more attention these days. In 1973 a quarter of the movie-goers looked at newspaper movie reviews, "everytime they're in the newspaper" or "most of the time." This percentage has increased to 29 percent by 1981. Those who look at movie reviews "occasionally" has increased by 6 percent, from one-third in 1973 to 39 percent in 1981. In total, that means a 10 percent increase in looking at movie reviews.

Table 7. Frequency of Looking at Newspaper Movie Reviews, 1973-1981 (U.S. Only)

Look at Newspaper Movie Reviews:	1973	1981	Percent Change
Everytime they're in the newspaper or most of the time	25%	29%	+4
Occasionally	33%	39%	+6
Hardly ever	38%	31%	-7
No movie review in the newspaper	4%	1%	-3
	100%	100%	
Base: Past year moviegoers	(454)	(612)	

This change revives old questions about the role of reviews in movie-going decisions, an issue that has not received research attention in the past, but will be considered more closely later in this report.

In this rare opportunity to look at changes taking place in movie behavior, we have seen the importance of taking a careful look at older people and the movies, of economic incentives for increasing Monday/Tuesday attendance, of the greater planned, premeditative approach to movie-going decisions, and newspapers' role in the process. We have first looked at general indicators and changes. Now, we will consider the details and nuances of these general findings.

II. Variations in Movie-Going

In this chapter, we will look at three things: (1) how movie-going varies among different types of people, (2) how the "baby boom" generation affects the movie industry, and (3) why people attend movie less frequently after they reach their mid-thirties.

From the beginning of this research report, the popularity of movies in US/Canada has been noted. Sixty-one percent have attended a movie in the past year. And as the findings in Table 8 show, a quarter of those in the US/Canada sample go to the movies at least two to three times a month. Another 22 percent go about once a month, and 36 percent go three to six times a year.

Age and Movie-Going

It is not news, of course, that young people attend movies more often than older adults, and in Table 8, we see this clearly with 44 percent of those 18-20 years old going to movies at least two-three times a month. Another 26 percent go once a month. However, when the 18-20 years old or even the 18-34 years old group is compared to the 35 years old and older group, a definite shift in movie-going patterns is clearly apparent. Before age 35, movie-going is a monthly or even weekly activity. After age 34, movie-going becomes a few-times-a-year activity. Nearly two thirds (63%) of those 35 and older attend six times a year or less often.

Table 8. Movie-Going Frequency in US/Canada, by Age

Movie-Going Frequency	Age			
	Total	18-20	18-34	35 & over
At least 2-3 times a month	25%	44%	31%	18%
About once a month	22%	26%	25%	19%
5-6 times a year	18%	15%	18%	18%
3-4 times a year	18%	10%	16%	20%
Less often	17%	5%	10%	25%
	100%	100%	100%	100%
Weighted Base: Movie-goers in US/Canada	(738)	(94)	(418)	(312)

The same pattern is true whether it is movie-goers in the United States or Canada. In Table 9 movie-going frequency has been grouped into frequent (at least 2-3 times a month), moderate (once a month or 5-6 times a year), and infrequent (less than 5 times a year) and results for the United States and Canada samples are shown separately. Similar patterns occur for both countries, but in the United States, the youngest age group and the oldest age groups are more likely to be frequent movie-goers that their counterparts in Canada.

Table 9. Movie-Going Frequency, by Age

	United States			
Movie-Going Frequency	Total	18-20	18-34	35 & over
Frequent	25%	46%	31%	18%
Moderate	40%	38%	42%	37%
Infrequent	35%	16%	27%	45%
	100%	100%	100%	100%
Base: Movie-goers	(910)	(115)	(577)	(324)

	Canada			
Movie-Going Frequency	Total	18-20	18-34	35 & over
Frequent	26%	38%	31%	10%
Moderate	42%	54%	46%	30%
Infrequent	32%	8%	23%	60%
	100%	100%	100%	100%
Base: Movie-goers	(128)	(24)	(97)	(30)

Education and Movie-Going

Generally education has a close association with much of human behavior. But in the case with movie behavior, the association of education and movie-going frequency is not very apparent (Table 10). About equal percentages of people in the different age groups are frequent attenders in each country, and the percentage differences between countries are small.

Table 10. Education and Movie-Going Frequency

United States

	Education		
Movie-Going Frequency	Less than H.S. Grad.	H.S. Grad.	Some College or More
Frequent	25%	27%	24%
Moderate	37%	37%	43%
Infrequent	38%	36%	33%
	100%	100%	100%
Base: Movie-goers	(88)	(352)	(446)

Canada

	Education		
Movie-Going Frequency	Less than H.S. Grad.	H.S. Grad.	Some College or More
Frequent	29%	24%	26%
Moderate	37%	43%	45%
Infrequent	34%	33%	29%
	100%	100%	100%
Base: Movie-goers	(35)	(42)	(51)

Income and Movie-Going Frequency

Like education, family income has little association with movie-going frequency in the United States (Table 11). There are no great differences between income levels in the frequency of movie attendance. However, in Canada, those with the lowest income level are substantially more likely than those in higher income levels to be frequent attenders. On the other hand, the lowest income level is also more likely than higher income levels to be infrequent attenders.

Table 11. Family Income and Movie-Going Frequency

United States

	Family Income		
Movie-Going Frequency	Under $10,000	$10,000 $24,999	$25,000 or over
Frequent	31%	24%	26%
Moderate	39%	40%	40%
Infrequent	30%	36%	34%
	100%	100%	100%
Base: Movie-goers	(66)	(357)	(405)

Canada

	Family Income		
Movie-Going Frequency	Under $10,000	$10,000 $24,999	$25,000 or over
Frequent	39%	27%	25%
Moderate	21%	41%	46%
Infrequent	40%	32%	29%
	100%	100%	100%
Base: Movie-goers	(10)	(47)	(55)

Marriage, Children and Movie-Going

Being young and without family responsibilities apparently make movie-going much easier. Indeed, age and family ties probably have a common dimension insofar as both involve different levels of social independence and freedom to make even last minute decisions about going somewhere. Just as young people have a greater degree of this freedom than older people, single and childless people have greater mobility and freedom than married people, especially those with children of a young age.

The findings in Table 12 add consistent and strong support for this claim. Movie-goers in the United States who are household heads and have at least one child 11 years old or younger at home were least likely (14%) to go to movies frequently (at least 2-3 times a month). Compare this to single people, of whom 41 percent were frequent movie-goers. Nearly half (43%) of those heads of household with young children went to movies less than 5 times a year (infrequent). Married movie-goers, who might also have children, had a movie-going frequency pattern that was very close to that of household heads with young children.

A similar pattern occurs among Canadian movie-goers (Table 12). Single people are considerably more likely to go to the movies more often than people with marriage and family responsibilities or those who are separated, divorced or widowed. In Canada, however, this latter group is the least likely to go to the movies, but those results may be due to the small sample base (12) rather than a true behavioral difference.

Table 12. Marital Status & Presence of Child 11 Years Old & Under: Movie-Going Frequency

United States

Movie-Going Frequency	Head of House/Child 11 & Under	Married	Separated Widowed, Divorced	Single
Frequent	14%	16%	24%	41%
Moderate	43%	39%	36%	44%
Infrequent	43%	45%	40%	15%
	100%	100%	100%	100%
Base: Movie-goers	(321)	(499)	(124)	(286)

Canada

Movie-Going Frequency	Head of House/Child 11 & Under	Married	Separated Widowed, Divorced	Single
Frequent	20%	18%	25%	36%
Moderate	45%	41%	25%	48%
Infrequent	35%	41%	50%	16%
	100%	100%	100%	100%
Base: Movie-goers	(34)	(65)	(12)	(50)

The limitations that a child in the family puts on movie-going are also evident from the results in Table 13. Respondents were asked how often they would like to go to the movies compared to how often they go now. The majority of people, regardless of the presence of children in the household said they wanted to go more than they do now. However, the more young children at home, especially of ages six and under, the more likely they were to say they would like to go to the movies more than they do now. Hence, there is a sizeable percentage who would probably go to movies more often if they did not have constraints of a child. The exception is in Canada, where having a child 6-11 years old makes little difference in the desire to go to the movies more often. It might be well worth considering how movies theaters might assist parents with young children at home to be able to go to the movies more than they do.

Table 13. Presence of Child 6-11 Years Old and Desire to go to Movies More Than Now

United States

	Have Child 6-11 Years Old		
	None	1	2 or More
Want to go to movies more often than now	53%	53%	61%

	Have Child Under 6 Years Old		
	None	1	2 or More
Want to go to movies more often than now	51%	62%	68%

Canada

	Have Child 6-11 Years Old		
	None	1	2 or More
Want to go to movies more often than now	49%	51%	48%

	Have Child Under 6 Years Old		
	None	1	2 or More
Want to go to movies more often than now	43%	66%	75%

Who Would Like to Go to the Movies More Than They Do?

Well over half of all movie-goers would like to go more than they do. This gives the movies a large untapped market. Are there clues about the characteristics of this untapped market? As with many other product categories, movies can probably increase attendance more easily by influencing those who occasionally go to movies, rather than those who rarely or never go.

This untapped movie market is found at every level of movie attendance, but those who go infrequently are the most likely to say they would like to go more than they now do (Table 14). Sixty-one percent of the infrequent movie-goers in the United States said they would like to go more than they do now. Even among the frequent goers (at least 2-3 times a month), 46 percent would like to go more. Only a very small minority (2%) wanted to go less often than they now go.

The pattern is much the same in Canada, where infrequent movie-goers are most likely (58%) to want to go more than they now do. Thirty-nine percent of the frequent and 48 percent of the moderate movie-goers say they would like to go more.

Table 14. Movie-Going Frequency & Desire to Go to Movies More Than Now

United States

	Movie-Going Frequency		
	Frequent	Moderate	Infrequent
How often like to go to movies			
More than now	46%	52%	61%
About as often as now	52%	45%	37%
Less than now	2%	3%	2%
	100%	100%	100%
Base: Movie-goers	(223)	(373)	(314)

Canada

	Movie-Going Frequency		
	Frequent	Moderate	Infrequent
How often like to go to movies			
More than now	39%	48%	58%
About as often as now	53%	51%	42%
Less than now	3%	1%	-
Don't know/no response	5%	-	-
	100%	100%	100%
Base: Movie-goers	(32)	(54)	(41)

Movie-goers who would like to go more than they do are important not only because they would like to go to the movies more than they do, but because they are more willing than the population as a whole to go to Monday/Tuesday movies, if tickets were half price. Sixty-one percent of the US/Canada sample who would like to go more would go if the price was half the normal cost, compared to 53 percent of the general population.

We also see in Table 15 that price is one of the main reasons people in both countries give for not going to movies as frequently as they would like. Only the time factor (too busy) is mentioned as a reason (47%) more than price (33%). Furthermore, we see in Table 15, price is more often a formidable barrier to movie-going for young people (40%) while the poor quality of films is a relatively more important reason for older adults (28%).

Table 15. Reasons for not Going to Movies as Often as One Would Like US/Canada Combined

	Would Like to go More		
	Total	18-34	35 & over
Reasons:			
Not enough time	47%	48%	46%
Price/economy	33%	40%	30%
Poor quality films	20%	12%	28%
Child-related	7%	11%	7%
Other people/no one to go with	4%	5%	4%
Other	14%	13%	10%
Weighted base: Those who would like to go to the movies more	(392)	(306)	(124)

(% add to more than 100% due to multiple responses)

Since there are about the same proportions of movie-goers who are 18-34 years old (55%) as movie-goers who are at least 35 years old (50%) who would like to go more than they do, and since price and film quality are concerns of those two age groups, a two-pronged approach to get them into theaters more often is suggested. Avoiding further price increase or encouraging Monday/Tuesday movie attendance at reduced prices would attract the younger set and older people to some extent. Recognizing the need for better film quality would tap some of the pent up movie-going urge among older North Americans. For older movie-goers, "poor quality" in films mainly means that there are not enough films that families can see and that the number of films that appeal to people over 34 years old is too limited.

Here Come the Baby Boomers and is There Life After 35?

In this section we will begin to look more specifically at that important market expanding generation, the baby boomers, who are now about age 18-34. At the same time, we will consider those movie-goers who are 35 years old and older to try to answer that nagging question of why older adults change their movie-going behavior rather sharply when they reach their mid-thirties. To do so, we over-sampled people who were age 18-34 and ages 35-49 to provide a large sampling base for detailed breakdowns of the data. Since this over-sampling was done only in the United States, the conclusions about age differences will be based only on United States data, but given the similarity of movie-going behavior people in the United States and Canada, much of what is said here could relatively safely be generalized to Canada as well.

In the 1970s, the single fastest-growing age group was 25 to 34, mushrooming from 25 million to 36 million. In the next decade, the 35 to 44 age bracket will be the fastest growing segment, exploding by an extraordinary 50 percent by the end of the 1980s.

Their sheer numbers demand our attention, as they did in earlier years, when their presence was training the society at every level. Now they are beginning to move into that age period when movie-going traditionally drops off abruptly. So our concern here is two-sided; how will the baby boom generation alter movie-going as they age, and what are some of the reasons movie-going frequency declines in older adulthood? These are questions that will be raised in remaining chapters of this report as well.

We have shown that economic reasons are a prime reason young people give for not going to movies as much as they would like, while "poor film quality" is a factor that also discourages older adults. The importance of film quality shows up again in Table 16, which shows the finding from a question about the quality of movies now compared to five years ago.

Table 16. Quality of Movies Compared to Five Years Ago, by Age

	United States Only			Canada
Movie-Quality:	All Ages	18-34 Yrs. Old	35-49 Yrs. Old	All Ages
Better	33%	40%	30%	39%
Same	27%	27%	30%	31%
Somewhat worse	24%	23%	22%	20%
Much worse	15%	10%	17%	7%
Don't know	1%	-	1%	3%
	100%	100%	100%	100%
Base: Movie-goers	(910)	(551)	(223)	(206)

Those under 35 rate movies, more highly than those 35 and older, by comparison with movies of five years ago. Canadian movie-goers are a little more likely than United States movie-goers to judge movies as "better."

There are also some sizeable differences between the two age groups with regard to types of movies they would like to see more of (Table 17). The baby-boomers prefer to see more of all the listed types of movies, compared to older adults. Nevertheless, both age groups prefer the various types of movie in identical rank orders, with adult comedies such as Neil Simon and Mel Brooks leading the list, and Kung Fu films ranking last. For both groups comic relief and romance films are the type they would most want more of. Despite this preference for escapism, it is noteworthy that serious films with social-psychological themes would appeal to the majority of young people and adults. For example, 24 percent of the baby-boomers had seen the social-psychological film "Ordinary People," and slightly more (29%) of those 34-49 years old said they had seen the film.

Table 17. Types of Movies They Would Like to See More of, by Age

	United States Only	
Movie Type:	18-34 Yrs. Old	35-49 Yrs. Old
Adult comedy (Neil Simon)	76%	63%
Romance	64%	58%
Slap stick (Jerry Lewis)	60%	53%
Social/psychological	53%	50%
Science fiction	43%	38%
Exorcism/sorcery	36%	22%
Horror/monster	29%	14%
Kung fu	15%	10%
Base: Movie-goers	(549)	(221)

Sharper differences between the baby-boomers and older adults are observable in Table 18, which presents the results of a question about some special effects and scenes they like or dislike in films. While the rank order of the various types of film scenes is more or less the same for each age group, the percentage differences are large. Certainly vivid outer space scenes are liked by most movie-goers in each age category, even though, as in all previous tables, baby-boomers like these vivid scenes more than the older movie-goers. Although vivid wounding or killing scenes in movies seems

Table 18. Film Special Effects, by Age

Special Effect	% of US Movie-Goers Who Like: 18-34 Yrs. Old	35-49 Yrs. Old
Unusual space scenes	69%	60%
Vivid fire/explosions/ crash scenes	43%	31%
Vivid sex scenes	34%	17%
Vivid horror scenes	33%	15%
Vivid wounding/killing scenes	19%	14%
Base: Movie-goers	(551)	(223)

to be increasingly present in films, only a small minority of each age group say they like them. The greatest age difference occurs with films that have vivid sexual scenes, and young people like these kinds of scenes considerably more than older movie-goers.

Age differences are not a major story in these results. In fact, the basic difference is that older movie-goers are looking for a better quality movie that relies less on the comedy, exorcism/sorcery, and horror/monster themes and that does not have as much vivid photography of explosion/crash, sex, and horror scenes.

III. What They Like and Dislike About Movies and Theaters

The question of old and new sources of competition for the movie theater will be explored in greater detail shortly. Meanwhile, consider the responses in Table 19 to our question about the relative merits of a movie in a theater or on a TV screen. About two-thirds of our samples in the United States (61%) and Canada (67%) agreed that seeing a movie in a theater adds something to the experience that TV does not. Again, the younger generation in the United States is more pro-theater than older adults, with nearly three-quarters (74%) of the baby-boomers agreeing versus 61 percent of those who are ages 35 to 49. So the movie theater still has special qualities that continue to be attractive to a large part of the general population in the two countries, and especially to younger people.

Table 19. Theaters Add Something to the Movies Experience that TV does Not, by Age

		United States Only		
	Canada	All Ages	18-34 Yrs. Old	35-49 Yrs. Old
Agree	67%	61%	74%	61%
Neither agree nor disagree	15%	16%	13%	13%
Disagree	18%	22%	13%	26%
Don't know	-	1%	-	-
	100%	100%	100%	100%
Base: Total sample	(206)	(1350)	(656)	(336)

What Kind of Films Would They Like More of?

Movie-goers in Canada and the United States put adult comedies like those by Mel Broooks and Neil Simon at the top of the list (Table 20). About two-thirds want more films like these. At the bottom of the list are Kung Fu and horror-monster films. More slapstick comedy films and romantic films would also be welcomed by our national samples. And a majority (51% in the U.S. and 63% in Canada) would like to see more social/psychological films. By and large, the two countries do not differ greatly in their film preferences, but more Canadians than movie-goers in the United States would like more slapstick, social/psychological, and exorcism/sorcery.

Table 20. Type of Films They Would Like More of

Type of Film	United States	Canada
Adult comedy (Neil Simon)	69%	66%
Romance	62%	64%
Slapstick comedy (Jerry Lewis)	56%	68%
Social/psychological	51%	63%
Science fiction	37%	35%
Exorcism/sorcery	28%	41%
Horror/monster	21%	26%
Kung Fu	14%	20%
Weighted base: Movie-goers	(610)	(128)

Special Effects in Films

At the first glance at the results in Table 21, one might wonder if the elaborate special effects in movies these days are winning the hearts of North Americans, since the percentage who say they like them is not impressive. Most say "it depends," except for unusual space effects, which are well received by a majority of movie-goers. The most important meaning in these results is probably that movie-goers do not give special effects unqualified approval. The more educated and sophisticated movie-goers of today like these special effects only when they meet their level of good taste. Very few say they definitely do not like these special effects.

Table 21. Special Effects in Films

	US/Canada Movie-goers				
Special Effect	Like	It Depends	Don't Like	Don't Know	
Unusual space scenes	60%	28%	11%	1%	100%
Vivid fire/explosion/ crash scenes	38%	40%	20%	2%	100%
Vivid horror scenes	25%	63%	11%	1%	100%
Vivid sexual scenes	27%	50%	22%	1%	100%
Vivid wounding/killing scenes	16%	65%	18%	1%	100%

Weighted Base: US/Canada Movie-goers for each effect = 738

Dolby sound and stereo sound have also added a great deal to the moviegoing experience (Table 22), especially for the younger generation.

Table 22. Dolby Sound and Stereo in the Movies, by Age

Dolby/Stereo Special Effects	Canada	United States Only All Ages	 18-34 Yrs. Old	 35-49 Yrs. Old
Yes like it	81%	79%	83%	76%
Depends	6%	6%	4%	10%
No, don't like it	11%	10%	9%	10%
Don't know	2%	5%	4%	4%
	100%	100%	100%	100%
Base: Movie-goers	(127)	(614)	(551)	(223)

Dolby and stereo sound at the movies are undoubtedly part of the reasons that so many people think that a movie in a theater adds something to the experience that television does not do.

Theater Ambience

What else is there about movie theaters that still makes movie-going a big entertainment attraction? Certainly the cleanliness and attractiveness of theaters is important (Table 23), as might be expected. What might not be so well recognized is the fact that nearly everyone thinks an important feature of movie houses is that one can go there and have the minimum of the distractions that are so frustrating to at-home viewers of TV movies. Even the baby-boomers say this is important. This is also reflected in the fact that 64 percent of the movie-goers in the United States sample and 61 percent of Canadians say that going to a movie in a theater gives them a chance to get out of the house. While this is more evident among the younger generation (69%), a large number (59%) of older adults consider this an important part of enjoying a movie in a theater.

Having other people in the theater is important to a majority of movie-goers (63% in Canada and 54% in the U.S.) a feature that apparently enriches the movie experience through a group's social contagion.

Table 23. Important Features of Enjoying a Movie in a Theater, by Age

		United States Only		
Important Feature	Canada	All Ages	18-34 Yrs. Old	35-49 Yrs. Old
No interruptions	97%	96%	96%	96%
Clean/attractive	99%	95%	96%	92%
Large screen	82%	81%	84%	81%
Chance to get out of house	61%	64%	69%	59%
Other people in the theater	63%	54%	54%	48%
Theater size	41%	34%	39%	33%
Base: Movie-goers	(128)	(610)	(549)	(221)

The large screen in theaters is definitely an important part of an enjoyable movie experience (8 out of 10), but the size of the theater seems relatively unimportant (41% of Canadian and 34% of U.S. movie-goers say it is important). Table 24 presents a more detailed breakdown of preferences in the size of theater among those who say that theater is important. Of the movie-goers who think theater size is important, the majority prefer a medium size theater. Few would choose a small theater. Young people are more likely than older people to prefer a large theater, which is a statistically significant difference.

Table 24. Preferred Theater Size for Those Who Consider Size Important, by Age

		United States Only		
Theater Size	Canada	All Ages	18-34 Yrs. Old.	35-49 Yrs. Old
Large	37%	33%	36%	24%
Medium	55%	56%	55%	64%
Small	8%	9%	8%	11%
Don't know	-	2%	1%	1%
	100%	100%	100%	100%
Base: Movie-goers	(51)	(207)	(215)	(72)

The proliferation of multiplex theaters seems also to be in harmony with people's preferences. Relatively few Canadian or United States movie-goers dislike multiplex theaters (Table 25); about equal numbers feel indifferent about them. However, the majority of baby-boomers like them (53%) more than older movie-goers (43%).

Table 25. Preference for Multiplex Theaters, by Age

		United States Only		
	Canada	All Ages	18-34 Yrs. Old	35-49 Yrs. Old
Like them	52%	47%	53%	43%
Neither like nor dislike	37%	40%	35%	44%
Dislike them	11%	13%	12%	13%
	100%	100%	100%	100%
Base: Movie-goers	(128)	(610)	(549)	(221)

Food concessions are a traditional part of the movie theater, and are a significant source of revenue for theater owners(Table 26). Generally movie-goers in Canada and the United States are favorably disposed. Only a few object to food concessions in the theater (6% to 7%), while there is a sizeable percentage (20%) who feel that the concession is a "must" for their movie-going enjoyment.

Table 26. Importance of Food Concessions in the Theater

Food Concessions:	United States	Canada
A must	20%	20%
Like, but not a must	27%	30%
Like, but wouldn't miss them	29%	23%
Neither like nor dislike	18%	20%
Should take them out of theaters	6%	7%
	100%	100%
Base: Movie-goers	(610)	(126)

The Movies' Technological Competitors

New electronic developments are rapidly changing our way of life, but will it change movies-in-the-theater habits? A recent Wall Street Journal article (August 19, 1981) about the disappearance of movie houses attributed their demise in large part to the expanding cable TV and video cassette field. The article quotes the president of the National Association of Theater Owners, Richard Orear, as saying, "I know there isn't any way to stop technology, but we've got to establish the value of showing motion pictures in theaters." Mr. Orear expresses both the anxiety that many theater owners feel and the way to alleviate the problem. This study confirms Orear's idea of how to deal with the problem. It also sheds some light on the reality of the threat from new technology to the theater business.

While it is true that some of the facts would support a dismal view of movies' future, a closer look at the data suggests that movies and the new technology may be synergistic -- they may help each other.

First the negatives. The new technological advances are bringing larger screens into homes, better sound, cable TV, subscription TV and now even direct satellite reception in the home. Certainly these are good reasons for concern among theater owners. Furthermore, except for ownership of video cassette players, the younger generation (the best movie-goers) is more likely than the older generation to have these special TV services. One would be tempted to infer that these people would move away from movies, in the future. Indeed, as Table 27 shows, about a third of Canadian and United States movie-goers, including those who would like to go to movies more often plan to buy video cassette players in the future.

Table 27. Ownership of Video Cassette Players, Cable TV Memberships, and Subscription TV, by Age

		US/Canada Movie-goers Who Would Like to Go to Movies More	United States Only		
Own or Subscribe	Canada		All Ages	18-34 Yrs. old	35-49 Yrs. Old
Cable TV	56%	34%	35%	38%	33%
Subscription TV	5%	11%	13%	15%	13%
Video Cassette Player	8%	5%	7%	5%	8%
Base: Movie-goers	(127)	(394)	(614)	(549)	(221)
Plan to Buy Video Cassette Player	33%	35%	30%	33%	26%
Base: Do not own Video cassette Player	(117)	(373)	(573)	(523)	(206)

But there are also positive facts. People still find the experience of seeing a film in a theater an important advantage over home television movies, as has been established by this report. Except for Canada, only a minority have cable and even fewer have subscription TV. Fewer still own video cassettes.

When we consider those who believe that seeing a movie in a theater has advantages over seeing a movie on TV, we see in Table 28 that these are the people who are most likely to buy a video cassette player in the future, and they are more likely to buy than even those who prefer TV movies. This suggests that many people like movies and they like them so well that they like to see them in the theaters and at home. While no single study can prove something conclusively, there is reason here to believe that movie theaters have a special attraction to movie-goers. Video cassettes could have a bonus effect for theaters by encouraging movie-going in the theater rather than discouraging movie theater attendance.

Table 28. Those Who Prefer a Movie in a Theater Over TV Movies and Future Purchases of Video Cassette Players

United States

Prefer Theater to TV Films	Video Cassette Player				Base: Don't Own Video Cassette
	Will Buy	Will Not Buy	Don't Know		
Agree	29%	70%	1%	100%	(585)
Neither agree nor disagree	13%	86%	1%	100%	(150)
Disagree	21%	78%	1%	100%	(206)

Canada

Prefer Theater to TV Films	Video Cassette Player				Base: Don't Own Video Cassette
	Will Buy	Will Not Buy	Don't Know		
Agree	36%	64%	-	100%	(129)
Neither agree nor disagree	22%	78%	-	100%	(28)
Disagree	20%	80%	-	100%	(35)

IV. Movie Decision Making

In a previous chapter of this report, it was found that movie-goers are becoming less likely to make a decision to see a movie on the same day they go. In other words, they are making fewer snap judgements about going to the movies. Consistent with that more careful approach to movie-going decision making are the changes taking place in the use of newspapers. People are making more use of newspapers in the movie decision process. Looking at movie advertisements more frequently has increased, and references to newspaper movie reviews has expanded in the period since 1973.

Here we will look more closely at this important process of making decisions about movies, considering once again the comparison between the younger baby boom generation and older adults, as well as Canadian and United States comparisons.

When They Make Their Decisions

Movie decisions have typically been made the same day that one goes to the movies. Half (50%) of all movie-goers in the United States and 48 percent of Canadians make their decision on the same day they go (Table 29). This is changing, as we have seen. Decisions are made increasingly in advance. As movie-goers become older, however, more advanced planning takes place.

Table 29. Time of Movie-Going Decision, by Age

	Canada	United States Only		
Time of Decision	All Ages	All Ages	18-34 Yrs. Old	35-49 Yrs. Old
Same day	48%	50%	54%	45%
1 to a few days before	38%	36%	33%	35%
A week or more before	9%	9%	8%	14%
Don't know/it varies	5%	5%	5%	6%
	100%	100%	100%	100%
Base: Movie-goers	(128)	(910)	(549)	(221)

Most movie-goers do not want to see a movie right after it comes out, but prefer to see it later (Table 30). The preference is the same in Canada and the United States.

Table 30. Urgency of Seeing a New Movie, by Age

	Canada	United States Only		
When to See a New Movie	All Ages	All Ages	18-34 Yrs. Old	35-49 Yrs. Old
Right after it comes out	30%	30%	34%	18%
Later	70%	70%	66%	82%
	100%	100%	100%	100%
Base: Movie-goers	(125)	(910)	(549)	(221)

Compared to those 35-49 years old, more of the baby boomers feel an urge to see a new film as soon as it comes out. However, even among the younger generation two-thirds prefer to go later.

Movie-Going as a Social Occasion

Few people enjoy going to the movies alone. Only 4 percent in the United States and 2 percent in Canada said they usually went to the movies by themselves (Table 31). This social aspect of movie-going is characteristic of both the young and old in the United States.

Table 31. Who They Go to the Movies With, by Age

	Canada	United States Only		
Go With	All Ages	All Ages	18-34 Yrs. Old	35-49 Yrs. Old
Alone	2%	4%	4%	3%
Date/spouse	51%	53%	57%	51%
Friends	26%	20%	23%	9%
Family	20%	23%	16%	37%
	100%	100%	100%	100%
Base: Movie-goers	(128)	(738)	(549)	(221)

Most go with a date or spouse, regardless of age. The only substantial difference between age groups is that the young movie-goer is more likely to go with friends and the older group more likely to go with their family.

The Movie Mood

For some people going to the movies is a matter of being in the mood. Once in the appropriate mood they decide what to see. Others find themselves interested in a specific movie and then find the time to go.

Most movie-goers in our study prefer the latter alternative (Table 32). Seventy- five percent said they first select a movie that they would be interested in seeing, and then make the arrangements to go to the movies. The more deliberate older adults are more likely than the baby boomers to first choose a specific movie and then go, rather than going just when the mood hits them (statistically significant difference).

Table 32. Movie Mood vs. Specific Movie, by Age

Respondent Best Described by:	Canada	United States Only		
	All Ages	All Ages	18-34 Yrs. Old	35-49 Yrs. Old
First get in the mood to go, then find specific movie	25%	22%	27%	20%
First get interest in specific movie, then find time to go	75%	78%	73%	80%
	100%	100%	100%	100%
Base: Movie-goers	(128)	(910)	(549)	(221)

Movie Advertising

Whether it is just to "see what's on" or to get oneself in a movie-going mood, to select a specific movie, or to select a theater, movie-goers often turn to the media for information. According to the results in Table 33, newspaper movie advertisements are their most important media source for this information. About half of the United States and Canada samples say that newspapers are the most useful media to rely on when deciding what movie to see, regardless of age. By contrast, 42 percent of the United States and 37 percent of the Canadian samples said TV commercials were the most useful.

Table 33. Useful Media for Movie Decisions, by Age

Most Important Media	Canada All Ages	United States Only All Ages	United States Only 18-34 Yrs. Old	United States Only 35-49 Yrs. Old
Newspaper ads	55%	53%	50%	53%
TV commercials	37%	42%	47%	38%
Other	7%	3%	3%	5%
Don't know	1%	2%	-	4%
	100%	100%	100%	100%
Base: Movie-goers	(206)	(614)	(551)	(223)

Among the most frequent movie-goers, newspaper movie advertisements are recalled more than TV commercials (Table 34). Nearly every frequent movie-goer recalled looking at a movie advertisement in a newspaper in the past month, regardless of age.

Table 34. Past Month Recall of Newspaper Advertisements and TV Commercials, by Frequent Movie-Goers and Age

	Canada	United States		
	Frequent Movie-goers	Frequent Movie-goers		
	All Ages	All Ages	18-34 Yrs. Old	35-49 Yrs. Old
Recall				
Newspaper ads	91%	94%	94%	91%
TV commercials	85%	88%	88%	89%
Base: Frequent Movie-goers	(32)	(153)	(164)	(35)

It is also evident from the results in Table 35 that newspaper movie advertisements are used for more than just an immediate information source when movie-goers are ready to go. Three-quarters of Canadian and United States movie-goers look at newspaper advertisements even when they are not going to the movies on that day. Twelve percent in Canada and 17 percent in the United States look at newspaper movie advertisements only when they want to go that day, and 1 and 8 percent respectively never look. Newspapers, then, can stimulate movie-going interest in advance as well as serve as a guide on the day of attendance. Canadian movie-goers are more habitual users of newspaper movie advertisements than United States movie-goers (27% to 12%).

Table 35. The Way People Look at Newspaper Movie Advertisements, by Age

	Canada	United States		
Look	All Ages	All Ages	18-34 Yrs. Old	35-49 Yrs. Old
Almost every time see newspaper	27%	12%	10%	13%
Often to see what's playing	12%	17%	19%	20%
Occasionally even when not going	35%	46%	44%	45%
Only when want to go that day	25%	17%	18%	17%
Never	1%	8%	9%	5%
	100%	100%	100%	100%
Base: Movie-goers	(127)	(614)	(557)	(223)

Importance of Credits in Movie Advertisements

The typical newspaper movie advertisement has a long list of key people who participated in the making of the film. How important do readers think these credits are in advertisements? We asked them the direct question, and Table 36 presents the results. Only the names of actors are considered to be important in movie advertisements by a substantial majority.

Table 36. Importance of Specific Credits in Newspaper Movie Advertisements

	United States		Canada	
Important to Include	Movie-goers	Frequent Movie-goers	Movie-goers	Frequent Movie-goers
Actors	87%	88%	92%	91%
Who does the music	47%	52%	50%	61%
Director	43%	54%	39%	49%
Producer	35%	36%	35%	39%
Screenplay author	30%	35%	31%	30%
Executive producer	22%	28%	29%	35%
Director of photography	20%	30%	24%	21%
Associate producer	11%	14%	15%	18%
Base: Movie-goers	(614)	(153)	(127)	(32)

Newspaper Movie Reviews

More people are paying attention to movie reviews in newspapers. In 1973, 25 percent of the United States sample looked at newspaper movie reviews most or every time they were in the paper, and in 1981, 29 percent looked at them as frequently. Occasional references to reviews were made by 33 percent in 1973 and by 39 percent in 1981. This change is another key indicator that people have become more interested in getting more detailed information about movies, and the change may also be a sign of the changing times. People are less satisfied with limited information, no matter how attractively it may be presented. But what impact do reviews have on movie-going?

The data strongly suggest that newspaper movie reviews are not a critical or major factor in the decision making process but that, to the extent that reviews influence movie-going, the net effect is to encourage movie-going rather than discourage it.

To begin with, results in Table 37 show that a small minority of movie-goers would be discouraged from seeing a specific movie because a movie review was negative toward the film. None of the Canadian frequent movie-goers would be definitely discouraged. About half said negative reviews would have no effect at all.

Table 37. Movie-Going Effects of Negative Movie Reviews

	United States		Canada	
Effect	Movie-goers	Frequent Movie-goers	Movie-goers	Frequent Movie-goers
Definitely discourage	12%	11%	5%	-
Think twice, but maybe go anyway	41%	42%	44%	45%
No effect	47%	47%	51%	55%
	100%	100%	100%	100%
Base: Movie-goers	(614)	(153)	(127)	(32)

A positive newspaper movie review, on the other hand, is much more likely to definitely encourage seeing a movie than a negative review is to definitely discourage seeing it (Table 38). Twenty-nine percent of United States movie-goers and 26 percent of Canadian movie-goers said a positive review would definitely encourage them to see a movie, and about 4 out of 10 said it would encourage them a little. About a third or less reported no effect of positive movie reviews. Canadians are less affected by reviews than movie-goers in the United States, but when they are affected, it is in the direction of encouraging attendance rather than discouraging it.

Table 38. Movie-Going Effects of Positive Movie Reviews

	United States		Canada	
Effect	Movie-goers	Frequent Movie-goers	Movie-goers	Frequent Movie-goers
Definitely encourage	29%	35%	26%	25%
Encourage a little	40%	38%	43%	39%
No effect	31%	27%	31%	36%
	100%	100%	100%	100%
Base: Movie-goers	(614)	(153)	(127)	(32)

METHODOLOGICAL NOTE

The following tables are provided for the reader who is interested in obtaining a quick estimate either of the stability of a given percentage or of the significance of the difference between two percentages.

Confidence Intervals for a Given Percentage
(at the 95% confidence level)

N (Base for %)	Reported Percentage: 10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	2.6	3.5	4.0	4.3	4.4
250	3.7	5.0	5.7	6.1	6.2
200	4.2	5.5	6.3	6.8	6.9
150	4.8	6.4	7.3	7.8	8.0
100	5.9	7.8	9.0	9.6	9.8
50	8.3	11.1	12.7	11.6	13.9
25	11.8	15.7	18.0	19.2	19.6

Example: If a report shows that 20% of all respondents (when N = 500) answer in a particular way, the chances are about 95 out of 100 that the true value is 20% or - 3.5%, that is, that the range 23.5%-16.5% contains the true value.

Significance of Differences Between Percentages
(95% confidence level)

Average of the Base of Percentages Being Compared	Average of Reported Percentages: 10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	3.7	4.9	5.7	6.1	6.2
250	5.2	7.1	8.1	8.6	8.8
200	5.9	7.8	8.9	9.6	9.8
150	6.8	9.1	10.3	11.0	11.3
100	8.3	11.0	12.7	13.6	13.9
50	11.7	15.7	18.0	19.2	19.7
25	16.7	22.2	25.2	27.2	27.7

Example: A report shows that 33% of all respondents from 30 to 39 years of age use a certain product and that only 27% of all respondents in the 40-to-49 age group use that product. Could this difference be due to chance?

In this example assume an average base of 500 for the represented percentages. The average of the percentages (33 + 27) equals 30% and the difference between the percentages is 6%.

Since 6% is greater than 5.7 (the figure in the table for this base and percentage) the chances are about 95 out of 100 that the product is used more by the 30-39 age group.

The table values are based on an assumption of simple random sampling. The figures may be too large if a stratified sampling technique was used and probably are too small if a cluster sampling technique was utilized. (For formulas used, see McNemar, Psychological Statistics, pages 54, 60.) The second table should be used with extreme caution if the bases being averaged are very different.

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Research Report

Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

WOMEN AND FASHION:

1981 Study of Clothes Buying
Attitudes and Behavior

DECEMBER, 1981

NEWSPAPER ADVERTISING BUREAU PROJECT

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper industry and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

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INTRODUCTION

Background and Purpose

In 1971 and again in 1979 the Newspaper Advertising Bureau conducted a national study of American women's attitudes and values, their consumer behavior, and their attitudes toward advertising and the media. By repeating many of the questions asked in the earlier study, the '79 study tracked some major changes in social values, consumer behavior and attitudes that had accompanied the dramatic entry of women into the work force in the decade of the 70's.

The fashion-related items in these studies included questions on images of the working woman and the full-time housewife, their clothes shopping patterns and their attitudes toward the fashion content of newspapers.

The present study was undertaken to up-date where women are now buying clothes, and to provide more detailed information about consumer behavior and attitudes of specific interest of women's fashion retailers and advertisers.

Study Description

In telephone interviews with a national sample of 501 women conducted by the ORC Caravan Express during the week of October 11-20, 1981, women were asked again where they had bought their last dress. This time they were also asked where they had bought their last separates. The new questions in this study focussed on their images of different types of retail stores, some aspects of their attitudes toward fashion, and the role of the media in informing the consumer about fashion, about where to shop, and in stimulating unplanned buying.

HIGHLIGHTS

Where They Buy

- Specialty stores are now more popular than department stores for dresses and separates. Half the women had bought one or both of these items in specialty stores, compared with 39% who had bought one or both in department stores, 24% in a national chain store, and 16% in a discount store.

- Specialty stores are most favored by younger and single women for dresses as well as separates.

- High income and professional/managerial women are evenly divided between department stores and specialty stores for dresses and separates. White collar women buy their dresses in the same general types of stores patronized by professional women but in buying separates they are somewhat less inclined to patronize department stores and somewhat more inclined to patronize discount stores. Blue collar women are the least likely to buy dresses or separates in department stores and the most likely to buy in discount stores.

- National chains and specialty stores are patronized fairly uniformly across occupational levels. Discount stores, expectably, are patronized most often by blue collar women.

- Specialty stores are patronized by one-third of the women in non-metro as well as metro areas. Department stores were more heavily patronized in larger cities than in smaller cities or non-metro areas. National chains did better in non-metro areas for separates.

Consumer Judgments of Different Types of Stores

- Department stores are ranked as best performers on four of the nine measures the consumer was asked to consider: they are seen as having the largest selection of clothes, as having the kind of clothes these women like to wear, as being the easiest to shop in, and as having the clothes arranged most conveniently.

- Specialty stores tie with department stores on three of the measures: on having clothes arranged most attractively, on having the most up-to-date fashions, and on having the highest quality of merchandise.

- Specialty stores outrank department stores on the quality of the sales help, which is one of the most attractive features of specialty stores.

HIGHLIGHTS (Cont'd)

- National chains are about tied with department stores on providing best value, which is a dimension that specialty stores do not qualify on. National chains are second to department stores for having the largest selection and having clothes arranged most conveniently. And they are close to specialty stores with regard to having the kind of clothes these women like to wear and being easiest to shop in. Altogether, the national chain store was ranked best on the various measures by between 21% and 35% of the women.

- The leading feature of discount stores was, as might be expected, "best value for the money" for which they ranked slightly ahead of specialty stores, but not as high as department stores and national chains.

- In general women tend to see the kind of stores in which they shop in a better light than they see other stores. But in some respects they are clearly prepared to make trade-offs. For example, specialty store customers know they are sacrificing value for the money and size of selection for service, attractive arrangement of the clothes, up-to-date fashions, and quality of clothes. And department store customers do not think of the sales help as a strong suit of department stores.

- In fact the single greatest source of dissatisfaction with department stores is the quality of the sales service. When asked what department stores should do to make it easier for them to shop there, almost one woman in three, of those who made suggestions, asked for improvement in the quality of the service. And 13% of the suggestions had to do with difficulty in finding the sizes or categories of merchandise they are looking for, a problem which is aggravated by the decline in service. If we add requests that whole departments be more clearly identified, this figure rises to one fifth of the suggestions.

Fashion Reputation of Store vs. Name of Designer or Manufacturer

- When asked which was more important when buying good clothes for herself, 22% said "neither." Older, better educated women were more likely to say "neither." Among those who acknowledged the fashion authority of one or the other, women who shop in department or specialty stores were evenly divided between store and designer. Chain store and discount store customers were somewhat more concerned with the fashion reputation of the store, which is understandable since presumably these women are not likely to buy in a price range which would carry known designer or manufacturer lebels.

One Classic Outfit

- The vast majority of women (72%) said they would prefer to buy one classic outfit rather than two or three outfits in the latest styles. The appeal of latest styles was concentrated among women who were 18-24.

Role of the Media

- What's in fashion? Newspapers are almost as important as magazines, a conventional source of fashion news, for finding out what's in fashion.
- Where to shop? Newspaper advertising takes a strong lead over the other media in being most helpful on where to shop. Among the four media, 63% chose newspapers, 20% magazines, 14% television, and 3% radio.
- Unplanned buying: More than half of the women said they had seen ads which had led them to buy clothes even though they weren't planning to. And in seven out of ten of these purchases it was a newspaper ad which had led to the unplanned purchase.

WHERE THEY BUY

Where did women make their most recent dress and separates purchase?

There are various indications that specialty stores have recently pulled ahead of department stores as the place women buy their dresses. In 1979 department stores were in the forefront for dresses, according to two consumer studies which asked about their most recent purchase: a national survey conducted for the Newspaper Advertising Bureau by the Response Analysis Corporation of Princeton,[1] and a survey conducted for Fairchild Publications by the Home Testing Institute.[2] But by 1981 department stores had dropped out of the leadership position.

Table 1.

Where Most Recent Dress Was Bought, 1979 and 1981

	1979		1981	
	Fairchild	NAB	NAB[3]	MRCA[4]
Department store	36	39	29	28
Specialty store	31	29	34	33
National chain store	17	13	15	13
Discount store	9	10	9	16
Other	3	1	7	11
Don't know/no answer	4	8	6	

---

1) Women, Work and Markets of the '80s, Newspaper Advertising Bureau, 1979. This study was conducted by personal interview with a national probability sample of 1,041 women, aged 18 and over.

2) The Customer Speaks, 1980, Fairchild Fact File. This study was conducted by questionnaires mailed to 3,500 women 18-64 in households with incomes of $15,000 and over. These women are members of the Home Testing Institute National Consumer Panel. An additional sample of single women households with incomes down to $10,000 was also included. Responses were received from 2,600 women.

3) As noted in the introduction, this study was conducted by telephone interviews with a national probability sample of 501 women aged 18 and over by the Opinion Research Corporation Caravan Express.

4) Cited in Chain Store Age, March 1981.

In the present study more women reported buying dresses and separates in specialty stores than in department stores: half had bought at least one of these items in a specialty store, compared with 39% who bought in a department store, 24% in a national chain store and 16% in a discount store (columnn 3 below). These rankings are the same for both types of items, though the percentages are somewhat lower for each (columns 1 and 2). Nor do department stores outrank specialty stores among those who may be called "habitual" customers -- the 48% who bought dress and separates in the same type of store (column 4 below).

Table 2.

	Where Most Recent Purchases Were Made (1981)			
	(1) Dress	(2) Separates	(3) Net, one or both items	(4) Both items in same type of store
Department store	29%	26%	39%	15%
Specialty store	34	35	50	19
National chain store	15	16	24	6
Discount store	9	12	16	5
Other (rummage, dress-maker, etc.)	7	7	a)	3
Don't know, no answer	6	4	a)	a)
	100%	100%	b)	48%
Bases:	(501)	(501)	(501)	(501)

a) Net figures not tabulated.

b) Total exceeds 100% because women who bought the two kinds of items in different types of stores appear in both types of stores.

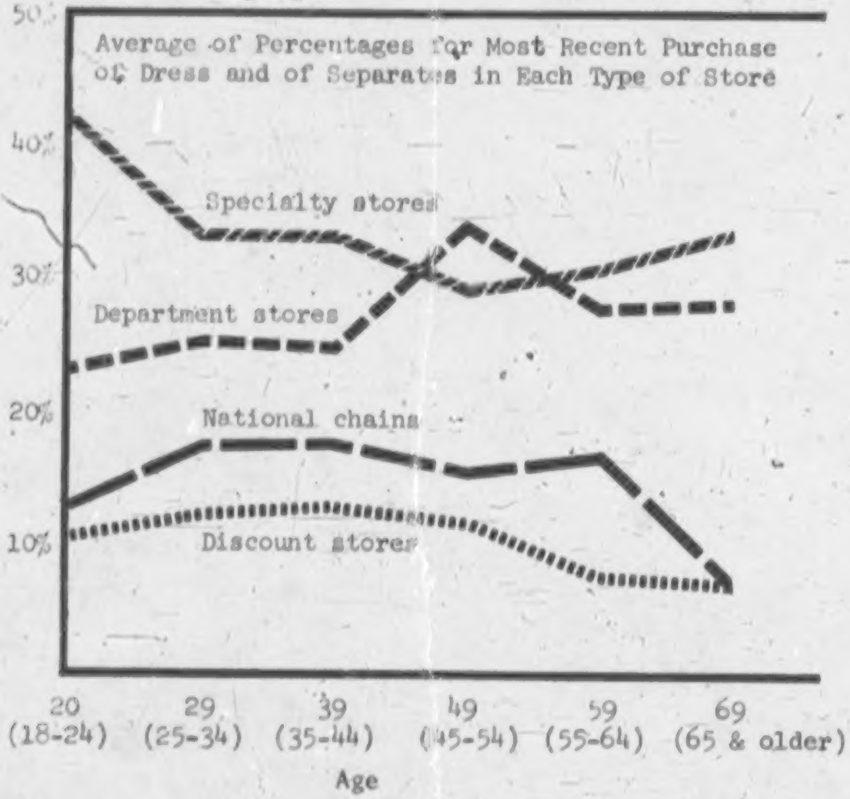
QUESTION: "Where did you buy your last dress? (What was the name of the store?)"

"Where did you buy your last separates, like jacket, skirt or pants? (What was the name of the store?)"

Who Buys Where

Age: Younger women (18-24) show a greater relative preference for specialty stores over department stores, for dresses as well as separates. But the relative positions of department stores and specialty stores, for dresses and for separates, shift from one age group to the next. (See Appendix for detailed tables.) The rise and fall of each type of store in successive age groups can be seen in the chart below which plots the averages of dress and separates purchasing for each type of store. Specialty stores outrank department stores among women under 45; national chain and discount store patronage are quite level across age groups; buying in discount stores appears to slack off somewhat earlier (around the age of 50) than in the national chains (around the age of 60).

Patronage of 4 Major Types of Stores by Age



If we compare dress buying in '81 with dress buying in '79 in three broader age categories which flatten out the rise and fall in the narrower age categories, it would appear that whereas department stores have become less popular at all ages, specialty stores have become more popular among women in the middle group (between 35 and the early fifties.)

Table 3.

Most Recent Dress Purchase
By Age (1979, 1981)

	18-34		35-54 ('81) 35-49 ('79)		55+ ('81) 50+ ('79)	
	'79	'81	'79	'81	'79	'81
Department store	37	28	39	27	42	30
Specialty store	33	36	26	38	27	29
National chain	12	16	13	13	13	14
Discount store	12	9	13	12	6	6
Other, don't know	6	11	9	10	12	21
Bases:	(431)	(186)	(300)	(171)	(293)	(136)

Note: Comparable figures not available for separates because the '79 study asked about coats.

Marital Status: Given the preference of younger women for specialty stores, it is no surprise to find that specialty stores are more favored by single women than by other women for dresses and for separates; approximately half made their purchases in a specialty store compared with one-third of other women. This does not mean that they were less likely than other women to have bought these items in department stores, since one in four, like the other women, had done so. Rather, it would appear that the national chains, discount stores, and other sources are less popular with single women.

Table 4.

Most Recent Purchase of Dress and Separates
By Marital Status

	Single	Now or Formerly Married
Last Dress		
Department store	27%	28%
Specialty store	46	32
National chain	9	16
Discount store	6	10
Other	4	8
Don't know	7	6
Last-Separates		
Department store	25%	26
Specialty store	52	32
National chain	12	17
Discount store	4	13
Other	4	9
Don't know	3	3
Bases:	(67)	(433)

Occupation and Income: The general types of stores women made their recent purchases in are quite similar for those who are employed and those who are not, but they do vary with occupational level and income level. (See Table 5.)

High income and professional/managerial women are evenly divided between department stores and specialty stores for both dresses and separates. Blue collar women are least likely to use department stores and they make a higher percentage of their purchases in discount stores than other women.

White collar women resemble professional women in the general types of stores in which they buy dresses, but in buying separates the percentages who patronized department stores and discount stores fall between professional women and blue collar women. That is, the buying of separates in department stores and discount stores proceeds in opposite directions on the continuum from professional women to white collar women to blue collar women. But specialty and national chains had fairly uniform patronage for dresses and separates across occupational lines.

Table 5.

Most Recent Purchase by Occupation and by Income

	Employment Status		Occupation			Household Income			
	Employed	Not Employed	Prof/ Mng.	White Collar	Blue Collar	Under $15,000	$15,000- $24,999	$25,000 $34,999	$35,000 or over
Dress Purchase									
Department store	31%	26%	35%	35%	21%	28%	28%	22%	40%
Specialty store	36	32	37	35	35	23	34	45	37
National chain	13	17	13	11	16	16	20	16	8
Discount store	9	10	6	7	15	12	10	9	6
Other	5	9	4	5	6	13	8	4	4
Don't know	7	6	4	9	7	9	1	4	6
Separates Purchase									
Department store	29%	23%	37%	29%	18%	23%	21%	29%	38%
Specialty store	36	34	33	40	32	35	31	36	37
National chain	16	17	18	12	19	16	18	17	14
Discount store	11	12	6	12	19	12	18	13	3
Other	5	10	3	4	10	9	8	3	4
Don't know	3	4	2	4	1	4	5	2	5
Bases:	(270)	(230)	(94)	(104)	(68)	(141)	(115)	(96)	(63)

Note: Percentages do not always add to 100 because of rounding.

City Size: Specialty stores were patronized by one-third of the women in non-metro as well as metro areas. Department stores were more heavily patronized in larger than in smaller cities. National chains did better in non-metro areas for separates. Discount stores too did somewhat better there than in large metropolitan areas for the purchase of separates.

Table 6.

Most Recent Purchase of Dress and Separates by City Size

	Non-metro	Metro 50,000-999,999	Metro 1,000,000 or over
Last Dress			
Department store	17%	28%	37%
Specialty store	38	34	31
National chain	17	17	11
Discount store	10	7	9
Other	10	7	5
Don't know	8	5	6
Last Separates			
Department store	13%	28%	34%
Specialty store	34	35	36
National chain	24	14	11
Discount store	15	14	8
Other	11	6	5
Don't know	3	3	5
Bases:	(157)	(134)	(210)

Purchasing patterns appear to be fairly uniform among the four major geographic regions. There are some differences but almost all are within what would be expected by chance, given the sizes of the samples.

To summarize, department stores did best for separates among 45-54 year old women, and for dresses and separates among working women who are professional or managerial; among women in the highest income families; and those living in the larger metro areas. They have fewest customers for both dresses and separates among blue collar women.

Specialty stores are most favored by single women. When dresses and separates are combined, a modest relationship between age and purchasing in specialty stores is apparent: younger women are most likely to buy in specialty stores, those around 50 are least likely, and there is a slight upturn among the older women.

The national chain stores did better among women living in non-metro areas for separates.

CONSUMER JUDGMENTS OF DIFFERENT TYPES OF STORES

Which Types of Stores Perform Best

Regardless of where women had bought their last dress or separates, they were asked which type of store performed best with regard to each of nine measures. The question they were asked was: "Thinking about the different kinds of stores that sell clothes for women, that is, department stores, discount stores, specialty shops, and national chains like Sears, Penney and Ward, which kind of store would you say. . ."

- Has the highest quality of clothes for women?
- Gives the best value in women's clothes for the money?
- Has the largest selection of women's clothes?
- Has the most knowledgeable and helpful salesclerks?
- Has the kind of clothes you like to wear?
- Has the most up-to-date women's fashions?
- Has the women's clothes arranged most attractively?
- Has the women's clothes arranged most conveniently for you?
- Is the easiest kind of store for you to shop in for clothes for yourself?

(To minimize bias, the starting item was rotated when the question was asked.)

Looking first at how the four different kinds of stores share the honors in this cross-section of 500 women (see table on p. 13), department stores hold the highest image on four of the nine measures:

47% said that department stores had the largest selection.
41% said department stores had the kind of clothes they like to wear.
42% said that department stores are the easiest to shop in.
39% said that they have women's clothes arranged most conveniently.

Specialty stores tie with department stores on three of the measures:

	Dept. Stores	Spec. Stores
Clothes arranged most attractively	37%	37%
Most up-to-date fashions	37	36
Highest quality	36	33

and specialty stores out-rank department stores slightly on the quality of their salesclerks (36% vs. 30% for department stores); 16% couldn't choose any type of stores as having the most knowledgeable and helpful salesclerks, which suggests that this is a general source of dissatisfaction.

However, the salesclerk is in fact one of the strongest features of specialty stores. Or to put it another way, whereas department stores received their fewest votes for the quality of their salesclerks, for specialty stores it was one of the top three items (36%), along with the attractiveness of their clothes arrangement (37%) and their up-to-date fashions (36%).

In noting that only 33% gave highest marks to specialty shops for the quality of clothes, it should be remembered that the designation "specialty shop" may cover a much wider price range than department stores. However, they are not seen as providing either the best value or the largest selection; only 10% chose specialty stores for these two items.

Although value for the money was not one of the department stores' strongest features, they are about tied with the national chains on this dimension; 35% said the national chains offered the best value, compared with 32% who said department stores are the ones which do.

National chains also did well -- second to department stores -- on having the largest selection of women's clothes (34%). And it comes as no surprise that the leading feature of discount stores, among the items included, was value for the money (15%).

Table 7.

Store Performance Rankings

Which type of store has.....	Bases	Department Stores	Spec. Stores	Nat'l Chain Stores	Disc. Stores	D.K./ N.A.
		%	%	%	%	%
Highest quality	(501)	36	33	26	2	7
Best value	(501)	32	10	35	15	10
Largest selection	(501)	47	10	34	4	7
Best salesclerks	(501)	30	36	21	2	16
Kind of clothes you like to wear	(501)	41	31	27	6	5
Most up-to-date fashions	(501)	37	36	23	4	8
Clothes arranged most attractively	(501)	37	37	21	2	8
Clothes arranged most conveniently	(501)	39	22	29	7	8
Easiest to shop in	(501)	42	25	26	8	4

Note: Percentages may add across to more than 100 because of multiple responses or rounding.

Customer's Views of the Stores They Purchase in

We have been talking about how all women feel about the four kinds of stores. Let us now look at how customers feel about the stores they shop in. In general, women who shop in a particular kind of store give it higher marks that do women who don't shop in that kind of store. For example, two women out of three (64%) who shop in department stores say they have the largest selection, compared with only one of three (37%) of those who do not shop in department stores.

Table 8.
Performance Ratings of Each Type of Store
By Customers and Non-Customers

	Dept.	Specialty	Nat'l Chain	Discount
Largest Selection				
Customers 1)	64	11	56	14
Not Customers	37	8	26	2
Easiest to shop				
Customers	58	35	47	24
Not Customers	32	14	19	5
Kind of clothes liked				
Customers	57	39	50	13
Not Customers	31	22	20	5
Most conveniently arranged				
Customers	52	30	54	18
Not Customers	30	13	21	5
Most attractively arranged				
Customers	47	43	38	3
Not Customers	30	31	15	1
Most up-to-date fashions				
Customers	48	42	37	9
Not Customers	30	30	18	3
Highest quality				
Customers	50	40	41	3
Not Customers	27	27	20	2
Best Salesclerks				
Customers	38	41	27	1
Not Customers	25	30	20	3
Best Value				
Customers	43	13	54	27
Not Customers	24	6	29	12
Bases : Customers	(197)	(253)	(123)	(80)
Not Customers	(304)	(248)	(378)	(421)

Note: "Customers" are women who bought dress and/or separates in that type of store.

Performance Ratings of all Stores by Customers of Each Kind

But there are some interesting deviations from the rule of seeing the store they shop in as best, mostly on the part of specialty store shoppers. (See table on page 17.) The specialty store customers know that department stores and national chains offer a better value and a larger selection, and they're more inclined to say department stores are best for conveniently arranged clothes and ease of shopping. What the specialty store customer prizes about specialty stores are the attractive arrangement of the clothes (43%), the up-to-date fashions (42%), the quality of the salesclerks (42%), and the quality of the clothes (40%). A large proportion (39%) feel that specialty stores carry the kind of clothes they want to wear, but almost as many (36%), feel that department stores carry their kind of clothes.

Department stores customers see their own type of store in a better light than other stores in every way, with one exception: the quality of their salesclerks. 38% of the department store customers say department stores have the best salesclerks, and 36% say specialty stores do. National chain shoppers are divided among all 3 types of stores on this measure. However, more of the national chain shoppers rate national chain stores higher than other stores on: largest selection, easiest shopping, most conveniently arranged, their kind of clothes, and best value for the money.

As for discount store shoppers, the best they can say for discount stores is that that's where they get the best value for their money (27%); and 24% say that that's where the shopping is easiest. But in every measure they feel that other stores surpass discount stores. For instance, even though "best value" is their highest vote for discount stores (27%), far more of them (40%) say that national chains offer the best value.

Table 9. Performance Ratings of All Types of Stores by Customers for Each Type

	Total	Dept. Store Customers*	Spec. Store Customers*	Nat'l Chain Customers	Disc.Store Customers*
Bases:	(501)	(197)	(253)	(123)	(80)
	%	%	%	%	%
LARGEST SELECTION:					
Dept. stores	47	61	49	27	34
Specialty	10	8	11	9	6
National chain	34	26	31	56	36
Discount	4	1	4	5	14
D.K.	7	3	5	5	10
EASIEST SHOPPING:					
Dept. stores	42	58	40	30	36
Specialty	25	22	35	18	9
National chain	26	18	23	47	29
Discount	8	4	5	8	24
D.K.	4	2	2	2	5
MY KIND OF CLOTHES:					
Dept. stores	41	57	36	33	36
Specialty	31	31	39	19	19
National chain	27	16	28	50	38
Discount	6	3	6	6	13
D.K.	5	3	2	4	8
CONVENIENTLY ARRANGED:					
Dept. stores	39	52	37	19	33
Specialty	22	20	30	16	9
National chain	29	23	25	54	38
Discount	7	5	6	9	18
D.K.	8	4	6	4	10
ATTRACTIVELY ARRANGED:					
Dept. stores	37	47	33	24	36
Specialty	37	37	33	36	33
National chain	21	13	18	38	29
Discount	2	1	1	2	3
D.K.	8	4	8	4	9
UP-TO-DATE FASHIONS:					
Dept. stores	37	48	34	28	31
Specialty	36	35	32	33	31
National chain	23	17	23	32	29
Discount	4	3	5	2	9
D.K.	8	4	5	7	8
HIGHEST QUALITY:					
Dept. stores	36	50	31	32	37
Specialty	33	33	40	26	23
National chain	26	17	23	41	39
Discount	2	2	2	1	3
D.K.	7	4	7	2	9
BEST SALESCLERKS:					
Dept. stores	30	38	30	27	24
Specialty	36	36	41	28	36
National chain	21	16	19	27	30
Discount	2	2	3	2	1
D.K.	16	14	12	16	10
BEST VALUE:					
Dept. stores	32	43	34	22	20
Specialty	10	10	13	4	5
National chain	35	26	32	54	40
Discount	15	13	13	14	27
D.K.	10	10	9	7	8

*"Customers" definition: those who bought dress and/or separates in the specified kind of store. Not mutually exclusive since women may have bought each item in a different store.

Note: Percentages may add to more than 100 because of rounding and possible multiple answers.

Performance Ratings by Age

Women of all ages agreed on several of the measures. Thus department stores ranked highest in every age group on having the largest selection and being the easiest kind of store to shop in. And specialty stores were generally chosen more often than department stores as having the best salesclerks. But on some issues the generations differed.

For women over 35, department stores hold first place for quality, for carrying the kind of clothes they like to wear, for up-to-date fashions, and the attractive arrangement of the merchandise. But younger women -- those who are 25-34 -- give first place to specialty stores on three of these four dimensions (all but "her kind of clothes"). And they are most inclined to attribute "best value for the money" to national chains.

The youngest group, 18-24, also feel that specialty stores arrange merchandise most attractively, but for them specialty stores tie with department stores on up-to-date fashions. And on "highest quality" they are divided among department stores, specialty stores and the national chains. For this youngest group of shoppers the national chains tie with department stores on the convenient arrangement of merchandise, and the national chains are about equal to department stores in carrying the kind of clothes they like to wear.

The implications of these differences are that while it may be said that tastes and standards change as the consumer gets older, the younger women's favorable perceptions of specialty stores and national chains vis-a-vis department stores may well presage a shopping pattern that will persist as they grow older.

Performance Ratings By Age

Table 10.

	Total	18-24	25-34	35-44	45-54	55-64	65+
Bases:	(501)	(72)	(114)	(95)	(76)	(81)	(55)
LARGEST SELECTION:	%	%	%	%	%	%	%
Dept. stores	47	49	46	49	47	44	46
Specialty	10	8	15	9	7	5	13
National chain	34	38	35	35	33	35	25
Discount	4	3	4	2	9	6	0
D.K.	7	4	4	5	4	10	16
EASIEST SHOPPING:							
Dept. stores	42	40	39	40	50	35	55
Specialty	25	24	31	24	20	23	24
National chain	26	29	25	26	22	33	15
Discount	8	8	4	11	9	7	5
D.K.	4	4	2	4	1	7	7
HER KIND OF CLOTHES:							
Dept. stores	41	44	32	46	47	35	44
Specialty	31	22	39	25	32	31	33
National chain	27	40	28	25	25	28	16
Discount	6	10	3	6	8	5	5
D.K.	5	1	3	6	0	12	7
CONVENIENTLY ARRANGED:							
Dept. stores	39	39	35	37	50	27	47
Specialty	22	24	28	28	14	21	24
National chain	29	38	29	28	26	33	20
Discount	7	4	9	8	8	7	5
D.K.	8	3	4	8	5	16	9
ATTRACTIVELY ARRANGED:							
Dept. stores	37	26	31	40	46	33	46
Specialty	37	42	48	36	33	30	31
National chain	21	25	17	23	20	30	7
Discount	2	3	1	2	0	2	0
D.K.	8	8	5	5	4	12	16
UP-TO-DATE FASHIONS:							
Dept. stores	37	36	26	42	49	36	33
Specialty	36	36	47	35	34	25	34
National chain	23	26	24	22	18	28	16
Discount	4	3	2	8	4	5	2
D.K.	8	3	4	8	5	14	15
HIGHEST QUALITY:							
Dept. stores	36	31	32	40	38	35	40
Specialty	33	33	43	31	37	23	29
National chain	26	32	27	24	21	28	18
Discount	2	1	1	0	4	4	0
D.K.	7	4	2	8	4	14	15
BEST SALESCLERKS:							
Dept. stores	30	31	28	34	29	30	27
Specialty	36	38	46	39	33	23	29
National chain	21	26	18	20	22	28	15
Discount	2	0	2	1	4	5	2
D.K.	16	7	9	11	16	22	35
BEST VALUE:							
Dept. stores	32	36	25	34	33	28	36
Specialty	10	14	10	6	5	10	18
National chain	35	36	46	29	37	35	22
Discount	15	14	14	23	16	11	7
D.K.	10	4	5	9	9	16	17

Note: Percentages may add to more than 100 because of rounding and possible multiple answers.

Performance Ratings by Family Income

On some measures women in all income groups share attitudes toward the different types of stores. Low and high income women tend to agree that department stores provide the easiest shopping, offer the largest selection, have their merchandise arranged most conveniently, and carry the kind of clothes the women like to wear. Specialty stores hold a good image for up-to-date fashions. National chains are well thought of by all as offering the best value for the money. But in other respects women at different income levels hold different views, which in part reflect the kinds of stores they actually shop in.

Among the least affluent (under $15,000) the national chains vie with department stores on several dimensions: highest quality, most up-to-date fashions, and sales help. In the $15,000-$25,000 income group, all three major types of stores tie for quality.

It is among women with family incomes over $35,000 that specialty stores hold the strongest image vis-a-vis department stores, since the national chains do not count for these women except for "best value for the money." For these women specialty stores do noticeably better than department stores on quality and attractive arrangement of clothes. Specialty stores do better among these women than the less affluent on up-to-date fashions and "her" kind of clothes, but department stores too score well on these dimensions among affluent women.

To summarize: Department stores do well among all groups but among the least affluent women the national chains compete for performance ratings. Among middle income groups department stores face competition on performance images from specialty stores and national chains. And among affluent women the department store competes more exclusively with the specialty store.

Ratings of Each Type of Store by Income

Table 11.

	Total	Under $15,000	$15,000 $24,999	$25,000- $34,999	$35,000+
Bases:	(501)	(141)	(115)	(159)	(63)
LARGEST SELECTION:					
Dept. stores	47	46	41	50	59
Specialty	10	7	12	11	10
National chain	34	35	42	33	29
Discount	4	3	3	4	3
D.K.	7	9	3	1	3
EASIEST SHOPPING:					
Dept. stores	42	43	37	41	46
Specialty	25	22	23	27	30
National chain	26	23	31	30	19
Discount	8	8	12	6	6
D.K.	4	7	0	1	3
HER KIND OF CLOTHES:					
Dept. stores	41	40	41	45	38
Specialty	31	24	28	33	43
National chain	27	30	33	27	19
Discount	6	6	10	0	5
D.K.	5	9	0	5	2
CONVENIENTLY ARRANGED:					
Dept. stores	30	37	35	36	46
Specialty	22	19	20	26	32
National chain	29	30	37	29	21
Discount	7	7	10	5	10
D.K	8	10	6	3	5
ATTRACTIVELY ARRANGED:					
Dept. stores	37	35	40	34	33
Specialty	37	33	30	46	51
National chain	21	24	27	18	13
Discount	2	2	2	0	0
D.K.	8	9	7	4	6
UP-TO-DATE FASHIONS:					
Dept. stores	37	30	32	42	43
Specialty	36	33	36	35	52
National chain	23	29	28	24	11
Discount	4	5	3	3	5
D.K.	8	13	4	3	3
HIGHEST QUALITY:					
Dept. stores	36	37	33	39	32
Specialty	33	19	34	40	54
National chain	26	35	31	19	11
Discount	2	2	2	1	2
D.K.	7	9	3	5	8
BEST SALESCLERKS:					
Dept. stores	30	29	28	33	35
Specialty	36	23	35	46	51
National chain	21	27	24	13	16
Discount	2	2	2	3	3
D.K.	16	23	14	8	5
BEST VALUE:					
Dept. stores	32	30	30	35	32
Specialty	10	11	9	10	9
National chain	35	35	37	39	32
Discount	15	11	18	15	17
D.K.	10	13	8	4	10

Note: Percentages may add to more than 100 because of rounding and possible multiple answers.

Performance Ratings by Employment Status and Occupation

Working women and nonworking women share their perceptions of the relative performance of the four types of stores on several dimensions. However, the working woman is more favorably disposed toward specialty shops regarding the performance of sales help. She is also more opinionated on this measure than the nonworking woman. (One fifth of the nonworking women said they did not know which type of store had the best sales help.)

Working women are more favorably disposed toward specialty shops on the arrangement of the merchandise - its attractiveness and its convenience - than nonworking women are. But nonworking women - who patronize chain stores more than working women - chose the chain stores as often as department stores for conveniently arranged clothes.

Further discriminations emerge when the kind of job a woman has is taken into account. Looking first at how department stores fare vis-a-vis specialty shops, we find the following. Although department stores and specialty shops tied on "up-to-date fashions" in the over-all rankings,for the blue collar women department stores rank ahead of specialty stores in this regard. And it is only for the blue collar woman that department stores outrank specialty stores in carrying the kind of clothes she likes to wear.

In general, professional/managerial women and white collar women hold similar views of the four types of stores. The national chains are ranked similarly by women in all three occupational groups.

Performance Ratings by Employmant Status and Occupation

Table 12.

	Total (501)	Employed Women (270)	Not Employed (230)	Professional (94)	White Collar (104)	Blue Collar (68)
LARGEST SELECTION: Bases:	%	%	%	%	%	%
Dept. stores	47	50	44	52	49	49
Specialty	10	10	9	11	10	12
National chain	34	34	34	35	35	29
Discount	4	3	6	1	2	4
D.K.	7	5	9	2	4	7
EASIEST SHOPPING:						
Dept. stores	42	42	42	39	41	47
Specialty	25	27	23	33	30	16
National chain	26	24	27	22	24	25
Discount	8	7	8	5	7	9
D.K.	4	3	6	1	2	6
MY KIND OF CLOTHES:						
Dept. stores	41	40	43	37	39	43
Specialty	31	33	28	36	34	28
National chain	27	26	29	24	26	25
Discount	6	4	8	2	4	7
D.K.	5	4	7	4	4	4
CONVENIENTLY ARRANGED:						
Dept. stores	39	40	37	40	39	41
Specialty	22	26	18	27	28	18
National chain	29	25	35	24	24	26
Discount	7	7	8	3	7	6
D.K.	8	8	8	6	7	12
ATTRACTIVELY ARRANGED:						
Dept. stores	37	36	38	33	32	43
Specialty	37	42	32	39	46	34
National chain	21	20	22	24	20	22
Discount	2	2	1	1	2	3
D.K.	8	6	11	3	6	4
UP-TO-DATE FASHIONS:						
Dept. stores	37	40	33	38	35	33
Specialty	36	39	33	43	41	35
National chain	23	21	25	19	21	21
Discount	4	3	5	3	3	6
D.K.	8	6	10	2	5	6
HIGHEST QUALITY:						
Dept. stores	36	36	36	34	35	37
Specialty	33	35	31	38	38	26
National chain	26	24	28	20	22	29
Discount	2	2	1	3	3	1
D.K.	7	6	8	6	5	10
BEST SALESCLERKS:						
Dept. stores	30	28	31	20	29	25
Specialty	36	41	30	50	46	20
National chain	21	22	21	18	20	28
Discount	2	3	2	3	4	1
D.K.	16	11	21	12	8	19
BEST VALUE:						
Dept. stores	32	31	32	29	30	38
Specialty	10	10	10	8	10	12
National chain	35	37	33	38	36	40
Discount	15	14	16	16	16	7
D.K.	10	10	11	9	9	10

Note: Percentages may add to more than 100 because of rounding and possible multiple answers.

"What Should Department Stores Do to Make it Easier for You to Shop There?

Answers to this open-ended question do not indicate how all customers feel about various aspects of department stores, but they do provide a vivid picture of top-of-mind concerns and problems that the customer has when she is shopping in a department store.

Although as reported earlier 42% of the women said that department stores were the easiest to shop in, almost three fourths of the respondents had suggestions to make about how department stores could improve the shopping experience. The remainder (29%) had no suggestions -- either because they were satisfied or because they didn't shop in department stores enough to be able to say what would make it easier.

> "They only have to open the door, I go there on my own."
>
> "I don't have to save the money anymore. It's not worth the hassle, so they couldn't do anything to make me shop there."

Table 13.

Major Suggestions for Improving Department Stores[1]

Improve sales help/service	31%
Arrange by size/item/style	13
Bigger/better variety (more styles/sizes)	17
Lower prices/more sales	14
Physical features (lighting, elevators, etc.)	7
Base: (Total who made suggestions)[1]	71%
Nothing	13
Don't know	16

---

[1] Other miscellaneous suggestions not shown here.

Salesclerks/Service

The single greatest source of dissatisfaction had to do with sales service: among those who made suggestions, almost one woman in three (31%) asked for improvement in the quality of service or an increase in the number of salesclerks. They wanted more help in finding the merchandise they were looking for, they wanted sales help who could provide fashion advice, they wanted polite sales help and quick service.

> "Number one is to have helpful sales people."
>
> "Have sales people who can help you, department stores don't have them."
>
> "More salesclerks to answer questions on taking things back."
>
> "More faster clerks, people who can get you out fast."
>
> "Sales help that are knowledgeable in every department."
>
> "Sales help that know about the product and that are polite."
>
> "They need more help, more individual attention for customers."
>
> "I think they should have more helpful clerks. They are very indifferent."
>
> "Make it easier to find sales help. Sometimes you're looking around and can't find anything."
>
> "Maybe if the salesclerks knew about current fashions and accessories."
>
> "Like service to be better -- more friendly. It's what I like about some other shops -- the special attention -- they help you."

Although more referred to a lack of service, a few of the women objected to being pressured into buying:

> "Well, it depends on which store you go to. I don't like pushy salespeople."
>
> "First of all, I like to look around, I always let them know when I'm ready for you I'll call you."
>
> "I think the better stores are leisurely for you -- no pressure."
>
> "They can't let you shop alone and take time to try them on, see how they look."

Organization of Store and Merchandise

One fifth of the suggestions concerned the way the departments and merchandise are arranged.[1] The sum of these suggestions indicate that women have difficulty in finding what they're looking for, and that especially in view of the deterioration in service, there is a need for clarity in the arrangement of departments and merchandise within the departments.

The range of other suggestions having to do with being able to find merchandise included the following:

Arrange the Merchandise by Size:

> "The particular size that you need should be in one place and not scattered around."
>
> "Just to have things arranged to make it easier for you to look for things you're looking for, like have dresses arranged by size, not mixed in with other sizes."
>
> "Should have a floor for different sizes. Exclusively departments (floors) for special sizes."
>
> "By size rather than designer."
>
> "Centralize the sizes rather than separate shops within shops, like the designer areas."

Have All of Same Items Together:

> "Organize themselves better. Everything is all over, all mixed up."
>
> "Should separate sizes and blouses in their own department."
>
> "Have the ladies' clothes all in one place."
>
> "They should have all dresses in one section. All slacks in one section."
>
> "They should have things for females all in the same area so you don't have to run all over the store."
>
> "Put all of one type of item - shirts, etc., - all in one place. Not in six different departments."

---

[1] 13% of these suggestions referred specifically to size, item, and style. The additional suggestions, originally tabulated as "miscellaneous" referred to over all department arrangements.

"Bring the department featuring all of the same items together instead of on different floors."

"With multiple racks, arranged all over the store, I can't remember what I have seen or what I want. Terribly confusing."

- Provide Signposts and Separations

"Have a big name so you can read the signs such as "Junior" so you can see them."

"Better defined area for sizes, i.e., junior, misses, tall girls, and proportions."

"Make the sizes obvious. The departments should be obviously separated. I would say have sales tables separated from regular stock."

- General Housekeeping

"I don't like sales items when they're dumped together."

"Don't have the racks so close together and don't cram the clothes. It's too hard to get anything out."

"Have the sizes where they're supposed to be. Have things neatly hung or folded."

Bigger, Better Variety of Styles and Sizes

As reported earlier, department stores are comparatively well thought of with regard to the selection of merchandise. (47% thought department stores have the biggest selection.) Nevertheless, almost one woman in six (17%) among those who made suggestions, wanted more merchandise to choose from.

"Have more clothes for older people. Most of the clothes are for younger people."

"A lot of stores should have a better assortment of sizes."

"Carry small sizes."

"More variety."

"Carry larger sizes in more fashionable styles."

"They do not carry any sizes that I wear."

"Young styles for older women."

"A bigger selection. They only have for skinny minnies."

At the same time there were a few who obviously feel overwhelmed by the masses of merchandise available in department stores, and who want the smaller boutique within the store, to approximate the specialty shop advantage:

> "Not so much merchandise. Too many choices."
> "Make it less overwhelming. Too large -- too confusing."
> "Have more specialty shops within the store."
> "They have too much. Divide the store into specialty sections. Has too much quantity."

Prices and Sales

About one woman in seven (14%) made suggestions bearing on the cost of department store merchandise: they said it would be easier to shop if the stores lowered their prices or ran more sales or had budget departments.

Other Suggestions

The remaining suggestions covered a wide miscellany of items -- from wanting stores nearer to home, or open all night, to providing wider aisles, better fitting rooms, lockers, child care, easier credit, more and better advertising, notification of sales, etc.

Only two or three women asked for alteration service and only two or three women asked for better displays of the merchandise or "showing how to wear the clothing."

Obviously, some of these suggestions are contradictory, some of them are not feasible, and some of them run counter to sound marketing decisions. But the fact that almost three out of four women came up with at least one suggestion, and that so many of them referred to problems in finding the merchandise, because of the confusion of the arrangements and/or the inadequate service, suggests that department stores may be losing ground as an enjoyable scene for shopping.

The customers appear to recognize that department stores are changing -- indeed a few women said "stop rearranging the departments, I like things in the same place each time I go." But if these changes are to serve the customer, she needs help, either through improved personal service of some kind, or through some other method of educating or informing her about the nature of the different departments. And if the burden of finding the merchandise in the multi departments must now rest with the customer, the arrangement of the merchandise must be useful to her, and the department signposts and the labeling of the merchandise itself must be informative.

By and large, suggestions and criticisms were made by women in all segments. Those who are more affluent, the employed women, and those who made their last purchases in specialty stores were somewhat more responsive to this question. But the nature of their suggestions were remarkably uniform across the board. Criticisms of sales help came from young and old and so did criticisms of the arrangement of the merchandise. Criticism of the sales help came from employed as well as nonworking women, from professional, white collar and other types of working women, and from women who shopped in department stores as well as those who shopped in other stores. (See Appendix)

FASHION ATTITUDES

Store vs. Designer and Classic vs. the Latest Styles

When a woman buys clothes for herself many things enter into the purchase decision in addition to cost -- where and when she'll wear them, how they fit, practical considerations of durability and maintenance, and not least, how they look on her, how fashionable they are, and what image she projects.

In two recent consumer studies women were asked about the importance of various criteria when they buy clothes for themselves.1) Both studies included "style" and in both studies a sizeable proportion of women said style was important: In the Virginia Slims study women were asked which of a list of things were important to them when buying clothes for social occasions, for leisure and for work. Style was important for clothes for social occasions but less so for casual clothes and for work, but here it must be remembered that one-third of American working women are in service or manual occupations. In the Fairchild study women said fit is the most important consideration in buying daytime dresses or a coat for dress wear. Next came quality of workmanship and fabric, followed by price and color. Style or fashion considerations followed (over one-third rated this extremely important). Brand or designer names were rated "extremely important" by only 4% of the women.

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1) 1980 Virginia Slims American Women's Opinion Poll, conducted by The Roper Organization, Inc.

The Customer Speaks, 1980, conducted by the Home Testing Institute for Fairchild Publications.

The present study focussed on two of these considerations -- style and brand or designer names -- with a different approach. The women were asked the following questions:

> "When you're buying good clothes for yourself, which is more important to you -- the fashion reputation of the store, or the name of the designer or manufacturer?"
>
> "For the same amount of money, would you rather buy ... one classic outfit that would be in style for a number of years or two or three outfits that are in the latest styles?"

Fashion Reputation of Store vs. Name of Designer or Manufacturer

Despite being faced with a forced choice question, more than one in five (22%) said "neither" and the remainder were evenly divided between the two.

Table 14.

Importance of Store vs. Brand

Fashion reputation of store is more important	36%
Name of designer or manufacturer is more important	36
Both	3
Neither	22
It depends	2
Don't know	1
	100%
Base:	(501)

The denial that either is primary was made more often by older and better educated women, by women in large metro areas and those who live in the West. (See next page.)

Among those who acknowledged the fashion authority of one or the other, professional women and women who had bought clothes in department stores or specialty stores were evenly divided between store and designer. Since these are the kinds of stores which provide both kinds of fashion authority and which advertise both, it is reasonable to find that both count to their customers. But the fact that their customers are divided suggests that these stores have not established their own primacy as fashion authority. The chain store and discount store customers were somewhat more concerned with the fashion reputation of the store. This too is understandable since these women are presumably less likely to buy even their good clothes in a price range which carries known designer or manufacturer labels.

Table 15.

Importance of Store vs. Brand, By Demographic Characteristics

	Bases:	Fashion Reputation of Store	Name of Designer or Manufacturer	Both	Neither	Depends	Don't Know
TOTAL	(501)	36	36	3	22	2	1
18-34	(186)	46	37	3	13	1	0
35-54	(171)	31	37	3	26	2	1
55 or older	(136)	30	34	2	27	4	3
Single	(67)	33	43	6	15	3	0
Married	(329)	39	35	3	21	1	1
Other	(104)	31	32	1	28	6	2
High School	(274)	39	36	4	17	3	1
College	(223)	34	35	1	27	2	1
Under $15,000	(141)	40	34	1	18	4	3
$15,000-$24,999	(115)	38	35	3	22	2	0
$25,000-$34,999	(96)	40	35	2	20	2	2
$35,000 or more	(63)	35	38	0	27	0	0
Employed	(270)	36	35	3	23	2	1
Not Employed	(230)	37	36	3	19	3	2
Prof., Managerial	(94)	36	37	1	25	1	0
White Collar	(104)	44	28	5	22	1	0
Blue Collar, Service	(38)	25	43	1	24	6	1
Northeast	(112)	41	30	4	21	3	1
North Central	(130)	34	36	3	23	2	0
South	(161)	38	41	3	14	3	1
West	(98)	33	31	1	32	1	2
Non-Metro	(157)	43	32	6	16	1	2
50,000-999,999	(134)	31	45	1	19	4	0
1,000,000 or over	(210)	35	32	2	27	3	1
Dept. Store Customer 1)	(197)	35	37	4	21	3	0
Specialty Store "	(253)	35	38	2	23	2	0
Nat'l Chain Store "	(123)	46	33	2	16	1	2
Discount Store "	(80)	41	34	3	20	1	1
5,4 day newspapers	(316)	33	37	3	24	3	0
3,2,1 days newspaper	(124)	47	38	2	13	0	0
None past 5 days	(56)	32	27	5	27	5	4

---

1) Bought dress and/or separates in that type of store.
Not mutually exclusive, since women may have bought each item in a different store.

Style: Classic vs. Up-to-the-minute

The question about style which was asked in this study was:

> "For the same amount of money, would you rather buy . . . one classic outfit that would be in style for a number of years or two or three outfits that are in the latest style?"

Even though in asking the question we alternated the sequence of choices to control for bias, "one classic outfit" was the resounding choice of most women; only 26% claimed a preference for two or three outfits in the latest styles, at least for the same amount of money.

Table 16.
Preference for Classic Style

One classic outfit	72%
2-3 latest styles	26
Don't know	2
	100%
Base:	(501)

A majority of women in every group chose the one classic outfit, but there were some variations in the degree to which this attitude prevailed. (See Appendix.)

Table 17 presents a profile of the two groups of women. Those who prefer one classic outfit are older and better educated than those who prefer the latest styles. They are also more likely to be professional or managerial women and customers of department stores.

Those who prefer the latest styles are younger, less well educated, and more likely to be blue collar workers. They include fewer department store customers and more discount store customers than the women who prefer the one classic outfit.

Table 17.

Demographic Profiles of Women Who Prefer One Classic Outfit and Those Who Prefer 2-3 in the Latest Styles

	One Classic Outfit	2-3 Latest Styles
Age:		
18-34	35%	47%
35-54	36	30
55 +	29	23
Bases:	(355)	(128)
Education:		
High school	47%	74%
College	53	26
Bases:	(354)	(129)
Occupation:		
Prof., managerial	39%	26%
White collar	38	42
Blue collar, service	23	32
Bases:	(192)	(66)
Store Customers:		
Department stores	33%	21%
Specialty stores	40	38
National chains	17	22
Discount stores	10	19
Bases:	(467)	(176)

THE ROLE OF THE MEDIA

Three questions were asked about the role of the media for the consumer: how useful they are to her in finding out what's in fashion, which is most helpful for making up her mind about where to shop, and where she has seen ads that led to making unplanned purchases.

Keeping in Touch with Fashion

It is not surprising that magazines, a conventional source of fashion news for women, ranked first as very useful for finding out what's in fashion. What is remarkable is that newspapers play an almost equally important role in this respect: 39% of the women said magazines are extremely or very useful for finding out what's in fashion and 33% say the same of newspapers. Television was rated extremely or very useful by 21% and radio by only 6%.

Table 18.

Usefulness of Each of the Major Media
As Source of Fashion News

	Magazines	Newspapers	Television	Radio
Extremely useful	9%	7%	5%	2%
Very useful	30	26	16	4
Somewhat useful	40	42	42	28
Not at all useful	18	22	34	62
Don't know	3	3	3	4
Base:	(501)	(501)	(501)	(501)

Question: "Thinking about the different ways you keep in touch with what's in fashion, how useful are each of the following to you personally in finding out what's in fashion -- that is, extremely useful to you, very useful, somewhat useful, or not at all useful?" (RANDOM START)

Magazines are more important for fashion news to young, single, employed women. Newspapers tend to be more uniformly important across the demographic categories. For example, working and nonworking women are in more agreement about newspapers than about magazines (36% and 30% respectively rate newspapers very useful, compared with 44% and 33% for magazines). And even though newspaper readership is not strong among very young women, like older women one-third find newspapers a very good source for keeping in touch with fashion.

Expectably, newspapers are not very useful in this regard to women who have not read a newspaper in the past five days, but magazines are also less important to these same women. For the frequent newspaper reader, however, newspapers are just as important as magazines for finding out what's in fashion (38% and 40% respectively).

It should be observed that the above question did not seek to make distinctions between the types of content which inform women about what's in fashion -- advertising, fashion news articles or discussions, or simply the appearance of women in photographs or on the screen. Presumably the relative weight of each type of content would correspond to the relative content of each medium.

Table 19. Ratings of the Major Media for Usefulness in Finding out What's in Fashion by Demographic Characteristics

	% who say "extremely" or "very" useful[1]				
	Magazines	Newspapers	Television	Radio	Bases for Each Media Rating
TOTAL	39%	33%	21%	6%	(501)
18-34	43	28	19	8	(186)
35-54	40	36	26	4	(171)
55 or older	31	35	17	6	(136)
Single	48	34	19	5	(67)
Married	38	32	20	5	(329)
Other	36	38	25	10	(104)
High School	35	31	25	7	(274)
College	44	35	16	5	(223)
Under $15,000	36	33	20	8	(141)
$15,000-$24,999	42	26	20	6	(115)
$25,000-$34,999	43	41	27	6	(159)
$35,000 or more	38	39	19	3	(63)
Employed	44	36	22	6	(270)
Not Employed	33	30	20	6	(230)
Prof., Managerial	38	33	16	6	(94)
White Collar	47	35	23	4	(104)
Blue Collar, Service	44	40	30	9	(68)
Northeast	40	41	18	8	(112)
North Central	39	28	25	4	(130)
South	43	35	22	6	(161)
West	30	26	17	5	(98)
Non-Metro	41	26	22	6	(157)
50,000-$999,999	37	34	24	5	(134)
1,000,000 or over	38	38	19	5	(210)
Dept. Store Customer	41	37	17	4	(197)
Specialty Store "	44	34	21	4	(253)
Nat'l Chain Store "	38	34	25	8	(123)
Discount Store "	39	30	26	13	(80)
5,4 day newspapers	40	38	20	7	(316)
3,2,1 days newspaper	43	30	23	7	(124)
None past 5 days	27	13	20	9	(56)

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[1] Table showing % who say "extremely," "very" or "somewhat" useful is shown in the Appendix.

Newspaper Advertising is Most Helpful on Where to Shop

From the point of view of the retailer, advertising may be designed to get women interested in buying, but its primary purpose is to get the customer into the advertiser's store. And for this function newspaper advertising takes a strong lead over the other media. Six out of ten women (63%) said newspaper advertising was the most helpful of the four media, followed by 20% who said magazine advertising ; 14% said TV and 3% said radio.

Table 20.

Advertising Most Helpful on Where to Shop	
In newspapers	63%
In magazines	20
On television	14
On radio	3
	100%
Base: (total mentions)	(466)

Question: When you're ready to buy clothes for yourself, in which one of the following do you find advertising most helpful to you in making up your mind about where to shop?

(READ LIST OF FOUR MEDIA. ROTATE START.)

Newspaper advertising is perceived as particularly helpful by the more mature, affluent woman. But even among those who are less newspaper oriented -- the young, single, low income, blue collar workers -- newspapers are the most helpful source for approximately half of the women. And in terms of the store they shop in, newspaper advertising is equally important to customers of all four types of stores.

Table 21. Advertising Most Helpful About Where to Shop By Demographic Characteristics

(Based on total Mentions of the four major media

	None D.K.	Total Mentions	Newspapers	Magazines	TV	Radio
Total	11%	(466)	63%	20%	14%	3%
18-34	2	(192)	52	22	20	6
35-54	13	(159)	67	20	12	1
55 or older	20	(113)	74	18	7	1
Single	4	(64)	48	31	17	4
Married	10	(309)	65	19	14	2
Other	16	(94)	65	19	13	3
High School	8	(260)	60	20	17	3
College	11	(205)	65	22	11	2
Under $15,000	10	(134)	57	22	18	3
$15,000-$24,999	6	(114)	68	15	14	3
$25,000-$34,999	9	(89)	65	16	16	3
$35,000 or more	10	(57)	78	19	1	2
Employed	9	(257)	60	22	15	3
Not Employed	12	(212)	66	18	13	3
Prof., Managerial	12	(86)	65	22	12	1
White Collar	6	(102)	61	23	12	4
Blue Collar Service	9	(67)	52	22	22	4
Northeast	7	(110)	53	29	14	4
North Central	11	(124)	68	19	11	2
South	12	(147)	65	15	18	2
West	11	(87)	62	23	12	3
Non-Metro	10	(151)	57	23	17	3
$50,000-999,999	13	(122)	70	12	14	4
1,000,000 or over	9	(193)	62	25	11	2
Dept. Store Customer[1]	10	(183)	68	19	11	2
Specialty Store "	9	(238)	61	25	12	2
Nat'l Chain Store "	9	(122)	58	17	21	2
Discount Store "	9	(78)	60	18	18	4
5,4 day newspapers	9	(297)	69	19	10	2
3,2,1 days newspaper	6	(119)	56	24	16	4
None past 5 days	25	(45)	37	25	33	5

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1) Bought dress and/or separates in that type of store. Not mutually exclusive, since women may have bought each item in a different store.

Note: Percentages may add to more than 100 because of rounding and possible multiple answers.

Newspaper Advertising Also Leads to Unplanned Buying

More than half of the women (56%) acknowledged that they had seen ads which had led them to buy clothes for themselves, even though they weren't planning to do so. And in seven out of ten of these purchases it was a newspaper ad which had stimulated the purchase.

Table 22.

Ads Which Stimulate Unplanned Buying

Have ads led to unplanned buying?	
Yes	56%
No	43
Don't know	1
	100%
Base:	(501)

Question: "Have you ever seen ads for clothes that led you to buy clothes for yourself, even though you weren't planning to?"

Where ad appeared	
Newspaper	69%
Magazine	15
Television	9
Radio	1
Other	5
Don't know	2
	100%
Base:	(280)

"The last time that happened, where did that ad appear? Was it . . ." (READ LIST OF FOUR MEDIA. ROTATE START.)

The unplanned purchase occurs more frequently among the 18-24, the single, and the employed. As income rises, so does the likelihood of unplanned purchases. (See p. 44.)

Newspaper ads are the stimulus for the large majority of women in almost all segments of the population. The lowest figure for newspapers occurred among blue collar women (who were less likely to make an unplanned purchase), but even there half the women (50%) said it was a newspaper ad. And even women who did not read a newspaper last week (only 46% of whom had made such a purchase) attributed their last unplanned purchase to a newspaper ad in the majority of cases. (See next page.)

Newspaper ads were equally effective among shoppers in the four types of stores. Moreover, newspaper ads appear to be equally effective among those who bought both items in the same kind of store and those who bought only one. To the extent that we can call a customer "loyal" if she made both purchases in the same kind of store, this suggests that newspaper ads are as effective with loyal customers as with customers who switch.

Table 23.

% Who Attributed Last Unplanned Purchase to a Newspaper Ad

(Based on all who had made unplanned purchase because of an ad they had seen)

		Bases:
Total	69%	(280)
Department store customers	72	(122)
Specialty store customers	70	(156)
National chain customers	67	(69)
Discount store customers	73	(44)
Bought both items in same kind of store	69	(128)
Bought only one item in a given type of store	71	(263)

Ads Leading to Unplanned Purchases, by Demographic Characteristics

Table 24.	YES									NO	D.K.
				Where Ad Appeared					Don't		
	Bases:	%	Bases:	Nsp. %	Mag. %	TV. %	Radio %	Other %	Know %	%	%
TOTAL	(501)	56%	(280)	69	15	9	1	5	2	43	1
18-24	(72)	71	(51)	59	21	12	2	4	2	29	0
25-34	(114)	59	(67)	70	12	12	3	3	1	39	2
35-44	(95)	59	(56)	68	18	9	0	5	0	40	1
45-54	(76)	53	(40)	78	13	8	3	3	0	46	1
55-64	(81)	57	(46)	67	15	9	0	9	2	43	0
65 or over	(55)	33	(18)	72	11	0	0	6	11	63	4
18-34	(186)	63	(118)	65	16	12	3	3	2	36	1
35-54	(171)	56	(96)	72	16	8	1	4	0	43	1
55 or older	(136)	47	(64)	69	14	6	0	8	5	51	2
Single	(67)	70	(47)	57	26	11	2	4	0	30	0
Married	(329)	55	(180)	69	13	10	2	5	2	44	1
Other	(104)	51	(53)	75	15	6	0	4	4	47	2
High School	(274)	55	(150)	64	15	11	2	5	3	44	1
College	(223)	57	(128)	73	16	8	1	4	1	42	1
Under $15,000	(141)	50	(70)	66	17	9	1	6	3	48	2
$15,000-$24,999	(115)	56	(64)	67	13	13	3	5	2	42	2
$25,000-$34,999	(96)	61	(59)	75	15	8	0	2	2	39	0
$35,000 or more	(63)	65	(41)	75	15	5	0	5	0	35	0
Employed	(270)	60	(163)	69	17	10	2	2	2	39	1
Not Employed	(230)	50	(116)	67	13	8	1	9	2	48	2
Prof., Managerial	(94)	64	(60)	77	18	5	2	0	2	35	1
White Collar	(104)	62	(64)	74	9	9	2	3	3	37	1
Blue Collar, Service	(68)	53	(36)	50	28	19	3	3	0	47	0
Northeast	(112)	56	(63)	54	25	6	3	10	2	42	2
North Central	(130)	55	(71)	76	13	6	3	3	1	45	0
South	(161)	60	(97)	69	12	13	0	4	2	38	2
West	(98)	50	(49)	76	12	10	0	2	2	49	1
Non-Metro	(157)	57	(90)	66	18	9	0	7	3	41	2
50,000-999,999	(134)	56	(75)	73	5	17	1	4	0	44	0
1,000,000 or over	(210)	55	(115)	68	20	4	3	3	2	44	1
Dept. Store Customer[1]	(197)	62	(122)	72	14	9	1	5	2	36	2
Specialty Store "	(253)	62	(156)	70	17	9	1	4	1	37	1
Nat'l Chain Store "	(123)	56	(69)	67	13	15	2	4	1	43	1
Discount Store "	(80)	55	(44)	73	7	11	2	2	5	44	1
5,4 day newspapers	(316)	56	(175)	71	13	10	0	4	2	43	1
3,2,1 days newspaper	(124)	63	(78)	67	17	8	5	5	1	36	1
None past 5 days	(56)	46	(26)	57	27	8	0	8	0	52	2

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1) Bought dress and/or separates in that type of store. Mutually exclusive, since women may have bought each item in a different store.

Note: Percentages may add to more than 100 because of rounding and possible multiple answers.

To summarize, newspapers have the unique ability of serving to keep women in touch with fashion and to engage customers for retail stores. They run a close second to magazines in communicating fashion news and they are far ahead in telling women where to shop and in stimulating unplanned purchases.

Table 25.

Summary Table: Role of the Media

	Newspapers %	Magazines %	TV %	Radio %
Very useful for finding out what's in fashion.....	33	39	21	6
Very or somewhat useful....	75	79	63	34
Most helpful about where to shop.............	63	20	14	3
Ads which led to last unplanned purchase........	69	15	9	1

APPENDIX A: A Review of Clothes Buying and Fashion Attitudes Related to Women's Occupation, 1971, 1979 and 1981.

It is no longer news that a large proportion of American women have jobs outside the home; a recent count indicates that 42,835,000 women and older are in the civilian work force -- 52% of all women 18 and over.1) This radical change of the past decade introduced employment status as a major demographic characteristic in the study of women's attitudes and behavior. It has also led to studying the difference between career women and those for whom the job itself is less motivating, and between housewives who plan to work and those who do not. But in studying women's clothes-buying attitudes and behavior it is particularly important to consider what kind of jobs women hold since the milieu of the professional or managerial woman differs somewhat from that of the white collar worker, and since both differ from that of the blue collar or service worker.

The retail fashion industry has kept up with the times by addressing itself to the working woman,2) but it has concerned itself in the main with the 24% who are professional or managerial, and the 42% who hold clerical or sales jobs -- the latter either directly or indirectly on the assumption that they model themselves after their more successful sisters. But the female work force is more diverse than that, since it includes 34% who are in manual or service occupations. And it is suggested that the retailer can profit from studying this segment as well.

Occupation of Employed Women in 1980

Professional, technical, managerial	24%
Clerical	35
Sales	7
Blue collar	14
Service	19
Farm	1

Source: U.S. Dept. of Labor

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1) Source: U.S. Dept. of Commerce, Labor

2) The term "working" and "nonworking" women are used only to differentiate those in the labor force from those who are not.

Following is a review of the findings of two previous NAB studies of women, followed by profiles of women in various employment categories derived from the present study.

The 1979 NAB study, Women, Work, and Markets of the '80s, traced changes from a similar study in 1971 in attitudes and activities among working and nonworking women. It found that both kinds of women had changed in certain respects that are relevant to the present study of women and apparel.

Images: The working woman was seen in very positive terms by non-working women as well as working women themselves in both studies, but there were some differences and some changes. In both studies working women, especially professional and white collar, characterized themselves as "feminine" to a greater extent than nonworking women did. (That is, not as many nonworking women thought working women were feminine.) And non-working women were more inclined to think of the working woman as "big spenders" than working women were of themselves, although the difference was smaller in 1979.

In 1971 over half the women, working and nonworking, characterized the working woman as liking to shop for clothes, but fewer of both kinds of women held this to be true in 1979. (This image was strongest among white collar workers.) In both studies "liking to shop for clothes" was considered less descriptive of nonworking women, by nonworking as well as working women.

Working Women and Full-Time Housewives As Described by Working and Nonworking Women

	Nonworking Women		Working Women		Working Women 1979		
"A Working Woman"	1971	1979	1971	1979	Prof.	White Collar	Blue Collar
Feminine	37%	34%	47%	47%	54%	53%	40%
Big spender	24	16	16	12	10	12	12
Likes shopping for clothes	52	43	53	44	43	50	40
"A Full-Time Housewife"							
Feminine	44	43	46	41	46	45	37
Big spender	10	5	9	8	8	8	8
Likes shopping for clothes	37	26	36	31	35	37	26
	(339)	(305)	(661)	(736)	(166)	(250)	(306)

The way women feel about how the media portray them may also be taken as a dimension of their self-image. In the 1979 study working women and nonworking women were far more satisfied by the portrayal of women in newspaper ads than in television. Greater satisfaction with newspaper advertising was true even of blue collar women who were less critical of television advertising than other working women were.

Does Newspaper and Television Advertising
Present Women the Way They Should be? - 1979

	Nonworking Women	Working Women	Prof./ Mng.	White Collar	Blue Collar
Newspaper Advertising:					
As they should be	51%	46%	40%	48%	47%
As they should not be	23	36	46	39	28
Don't know	26	18	14	13	25
Television Advertising:					
As they should be	32%	30%	25%	26%	35%
As they should not be	51	59	67	64	51
Don't know	17	11	8	10	14
Bases:	(305)	(736)	(166)	(250)	(306)

Clothes for Work: Except for manual workers the majority of employed women said "I have work in mind when I buy most of my clothing." However, there was a drop between 1971 and 1979 in the percentage of professional women who said they bought more clothes and shoes because of work. (In 1971, 53% of the professional/managerial women said they bought more clothing because of work, but by 1979 this percentage dropped to 40%.) Furthermore, the number of professional/managerial women who said "I am expected to dress well where I work" dropped from 52% to 37%. And the proportion of manual workers who said "I am expected to wear a uniform or work clothes" dropped from 45% to 33%. Taken together these findings suggest a greater tolerance of personal standards in dress and working women, and less discrimination between clothes for work and clothes for other situations.

Work Oriented Shopping for Clothes
(by Occupation)

	Professional/ Managerial		Clerical/ Sales		Service/ Manual	
	1971	1979	1971	1979	1971	1979
"I have work in mind when I buy most of my clothes."	54%	53%	55%	52%	26%	20%
"I buy more clothes because of work."	53	40	41	42	21	21
"I buy more shoes because of work."	46	32	31	26	25	20
"At work I wear a uniform or work clothes of some kind."	24	21	13	13	45	33
"I am expected to dress well where I work."	52	37	49	42	19	14
Base:	(153)	(166)	(250)	(250)	(252)	(306)

Question: Which of the statements on this card apply to you?

Shopping Patterns: In both studies, clothes shopping by working and nonworking women was reported as overwhelmingly an in-store activity. This was especially true of professional women.

Past Month Clothes Shopping by Mail or Telephone

	Nonworking Women		Working Women		Working Women, 1979		
	1971	1979	1971	1979	Prof.	White Collar	Blue Collar
# of times shopped by mail or telephone:							
1 or more	10%	10%	11%	15%	12%	17%	15%
None	90	89	89	85	88	83	85
Base:	(242)	(305)	(509)	(736)	(166)	(250)	(306)

In both studies, working women were far more likely to have made a shopping trip in the past month, and they had done so more frequently than had those nonworking women who had shopped. White collar women shopped most frequently.

Past Month Shopping for Clothes at Stores, 1971-1979

	Nonworking Women		Working Women		Working Women, 1979		
	1971	1979	1971	1979	Prof.	White Collar	Blue Collar
# of times went shopping in stores:							
4 or more	20%	16%	27%	26%	23%	31%	22%
2-3	19	23	29	29	31	28	28
Once	17	20	15	22	23	21	22
None	44	40	28	24	23	20	28
Base:	(242)	(305)	(509)	(736)	(166)	(250)	(306)

By 1979 the nonworking women as well as the working women were more likely than before to shop for clothing at a particular time of day. The percent who said no particular time of day dropped from 24% to 16% among working women, and from 36% to 20% among nonworking women. Among the working women there was an increase in evening shopping. Among nonworking women the largest increase was in afternoon shopping. Compared to all other women, employed or not, white collar women were most prone to evening shopping (29%).

Time of Day for Clothes Shopping, 1971-1979

	Nonworking Women		Working Women		Working Women, 1979		
	1971	1979	1971	1979	Prof.	White Collar	Blue Collar
Time of Day							
Morning	22%	28%	19%	17%	14%	18%	18%
Midday (Noon-3pm)	18	17	18	19	22	22	17
Afternoon (3-6pm)	12	23	24	22	23	18	24
Evening	7	11	14	25	23	29	21
No particular time	36	20	24	16	16	12	18
DK/NA	5	1	1	1	2	1	2
Base:	(242)	(305)	(509)	(736)	(166)	(250)	(306)

The Present Study (1981)

This analysis by the occupation of working women casts light on findings in the present study as well. At the beginning of the present report it was stated that department stores had dropped out of their leadership position as the kind of store where women buy dresses. In 1971 and 1979 department stores held the lead for working women and nonworking women; in 1981 fewer women, working or not, had bought their last dress in a department store. But the movement toward specialty stores was most marked among blue collar women. The proportion who reported buying their last dress in a specialty store rose from 21% in 1979 to 35% in 1981. And the proportion of blue collar women who reported buying their last dress in a department store dropped from 37% to only 21%, which suggests that the disappearance of budget shops from department stores has driven the working class woman to her own class of specialty store.

Where Last Dress Was Bought, 1979-1981
According to Occupation

	Employment Status				Occupation					
	Nonworking Women		Working Women		Prof.		White Collar		Blue Collar	
	1979	1981	1979	1981	1979	1981	1979	1981	1979	1981
Department store	38	26	40	31	44	35	43	35	37	21
Specialty store	30	32	28	36	31	37	33	35	21	35
National chain	11	17	14	13	10	13	12	11	19	16
Discount	10	10	10	9	8	6	7	7	14	15
All others/don't know	11	15	8	12	8	8	5	14	10	13
Bases:	(305)	(230)	(736)	(270)	(166)	(94)	(250)	(104)	(306)	(68)

APPENDIX B: Additional Tables

Most Recent Dress Purchase, by Demographic Characteristics

		Dept. Store	Spec. Store	Nat'l Chain Store	Discount Store	Other	Don't Know
TOTAL	(501)	29	34	15	9	7	6
18-34	(186)	27	35	16	9	5	6
35-54	(171)	27	37	13	12	5	5
55 or older	(136)	29	29	14	6	14	7
Single	(67)	27	46	9	6	4	7
Married	(329)	29	33	16	10	6	6
Other	(104)	26	32	13	9	13	7
High School	(274)	23	33	15	12	9	8
College	(223)	35	36	13	5	6	4
Under $15,000	(141)	28	23	16	12	13	9
$15,000-$24,999	(115)	28	34	20	10	8	1
$25,000 -34,999	(96)	22	45	16	9	4	9
$35,000 or more	(63)	40	37	8	6	4	6
Employed	(270)	31	36	13	9	5	7
Not Employed	(230)	26	32	17	10	9	6
Prof., Managerial	(94)	35	37	13	6	4	4
White Collar	(104)	35	35	11	7	5	9
Blue Collar, Service	(68)	21	35	16	15	5	7
Northeast	(112)	30	35	10	9	8	8
North Central	(130)	28	38	18	8	5	4
South	(161)	26	33	17	9	9	6
West	(98)	32	31	11	11	8	7
Non-Metro	(157)	17	38	17	10	10	8
50,000-999,999	(134)	28	34	17	7	7	5
1,000,000 or over	(210)	37	31	11	9	5	6
Dept. Store Customer 1)	(197)	73	18	4	3	2	2
Specialty Store "	(253)	15	68	6	3	2	6
Nat'l Chain Store "	(123)	11	18	59	4	3	5
Discount Store "	(80)	9	14	14	56	5	3
5,4 day newspapers	(316)	31	36	13	8	5	5
3,2,1 days newspaper	(124)	25	35	18	9	7	6
None past 5 days	(56)	23	18	16	14	18	11

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1) Bought dress or separates in that type of store. Not mutually exclusive, since women may have bought each item in a different store.

Most Recent Separates Purchase, by Demographic Characteristics

		Dept. Store	Spec. Store	Nat'l Chain Store	Discount Store	Other	Don't Know
TOTAL	(501)	26	35	16	12	8	4
18-34	(186)	22	42	16	13	4	3
35-54	(171)	31	28	20	12	6	3
55 or older	(136)	26	35	12	10	14	5
Single	(67)	25	51	12	4	4	3
Married	(329)	26	32	19	13	7	3
Other	(104)	25	36	11	12	13	5
High School	(274)	19	34	18	15	9	4
College	(223)	34	36	13	9	3	4
Under $15,000	(141)	23	35	16	12	9	4
$15,000-$24,999	(115)	21	31	18	18	8	3
$25,000 -34,999	(96)	29	36	17	13	3	2
$35,000 or more	(63)	38	37	14	3	4	5
Employed	(270)	29	36	16	11	5	3
Not Employed	(230)	23	34	17	12	10	4
Prof., Managerial	(94)	37	33	18	6	3	2
White Collar	(104)	29	40	12	12	4	4
Blue Collar, Service	(68)	18	32	19	19	10	1
Northeast	(112)	29	34	15	11	10	1
North Central	(130)	28	32	20	9	6	5
South	(161)	22	37	14	15	8	4
West	(98)	27	38	15	11	4	5
Non-Metro	(157)	13	34	24	15	11	3
50,000-999,999	(134)	28	35	14	14	6	3
1,000,000 or over	(210)	34	36	11	8	5	5
Dept. Store Customer 1)	(197)	66	19	7	4	4	2
Specialty Store "	(253)	14	70	9	4	1	2
Nat'l Chain Store "	(123)	6	13	66	9	7	-
Discount Store "	(80)	8	10	6	74	2	-
5,4 day newspapers	(316)	31	34	16	11	7	3
3,2,1 days newspaper	(124)	16	38	21	15	6	3
None past 5 days	(56)	21	38	7	13	17	5

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1) Bought dress or separates in that type of store.
Not mutually exclusive, since women may have bought each item in a different store.

Bought Both (Last Dress & Separates) in Same Kind of Store by Demographic Characteristics

		Dept. Store	Spec. Store	Nat'l Chain Store	Discount Store
TOTAL	(501)	15	19	6	5
18-34	(186)	12	20	6	5
35-54	(171)	17	18	8	6
55 or older	(136)	16	18	4	2
Single	(67)	12	30	6	1
Married	(329)	16	17	8	6
Other	(104)	15	18	2	4
High School	(274)	11	18	6	6
College	(223)	20	20	6	3
Under $15,000	(141)	16	14	6	4
$15,000-$24,999	(115)	12	17	10	10
$25,000-34,999	(96)	10	19	5	4
$35,000 or more	(63)	24	24	5	2
Employed	(270)	17	19	6	5
Not Employed	(230)	13	19	7	4
Prof., Managerial	([illegible]4)	21	17	6	4
White Collar	(104)	19	21	3	4
Blue Collar, Service	(68)	10	18	9	5
Northeast	(112)	19	21	6	3
North Central	(130)	15	18	10	4
South	(161)	12	20	5	6
West	(98)	16	14	3	7
Non-Metro	(157)	8	21	10	6
50,000-999,999	(134)	12	16	4	5
1,000,000 or over	(210)	23	19	4	4
Dept. Store Customer 1)	(197)	39			
Specialty Store "	(253)		37		
Nat'l Chain Store "	(123)			28	
Discount Store "	(80)				30
5,4 day newspapers	(316)	18	20	5	5
3,2,1 days newspaper	(124)	9	19	9	4
None past 5 days	(56)	13	13	4	7

---

1) Bought dress or separates in that type of store.
Not mutually exclusive, since women may have bought each item in a different store.

Major Consumer Suggestions for Department Stores
How to Make Shopping Easies for Her[1]

	Total Who Made Suggestions	Better Sales Help	Better Arrangement By Item	Better Arrangement By Size	More Styles, Sizes	Lower Prices, More Sales
	%	%	%	%	%	%
Total	71	31	10	8	17	14
18-34	74	31	11	7	19	18
35-54	73	29	7	5	18	12
55 +	68	32	12	15	15	10
Employed	75	31	11	9	17	15
Prof., Mng.	75	31	10	3	20	15
White Collar	75	32	12	8	17	16
Blue Collar, Service	77	29	5	17	13	9
Not Employed	68	29	7	6	18	15
Under $15,000[2]	68	32	6	6	19	10
$15,000-$24,999	73	27	12	7	18	27
$25,000+	75	33	11	8	16	11
Dept. Store Customers[3]	72	32	8	8	17	13
Specialty Store Customers	80	29	11	11	18	14
National Chain Customers	69	32	10	9	22	17
Discount Store Customers	72	26	7	6	28	19

---

[1] Based on those who made suggestions, miscellaneous other suggestion not shown here.

[2] Household income.

[3] Overlapping categories.

One Classic Outfit vs. 2-3 Latest Styles, by Demographic Characteristics

		One Classic Outfit	2-3 in the Latest Styles	Don't Know
TOTAL	(501)	72	26	2
18-34	(186)	66	33	3
35-54	(171)	76	22	1
55 or older	(136)	75	21	2
Single	(67)	63	36	1
Married	(329)	71	26	3
Other	(104)	78	19	3
High School	(274)	61	35	4
College	(223)	84	15	1
Under $15,000	(141)	71	26	3
$15,000-$24,999	(115)	70	29	1
$25,000-34,999	(96)	71	28	1
$35,000 or more	(63)	81	16	3
Employed	(270)	72	25	3
Not Employed	(230)	71	27	2
Prof., Managerial	(94)	80	18	2
White Collar	(104)	69	27	[illegible]
Blue Collar, Service	(68)	66	31	3
Northeast	(112)	73	25	2
North Central	(130)	7[illegible]	26	2
South	(161)	71	25	4
West	(98)	70	29	1
Non-Metro	(157)	71	28	1
50,000-999,999	(134)	72	26	2
1,000,000 or over	(210)	72	24	4
Dept. Store Customer [1]	(197)	79	19	2
Specialty Store "	(253)	73	26	1
Nat'l Chain Store "	(123)	66	32	2
Discount Store "	(80)	56	43	1
5,4 day newspapers	(316)	75	23	2
3,2,1 days newspaper	(124)	64	34	2
None past 5 days	(56)	68	25	7

---

1) Bought dress or separates in that type of store. Not mutually exclusive, since women may have bought each item in a different store.

Ratings of the Major Media for Usefulness in Finding out What's in Fashion by Demographic Characteristics

	% Who say "extremely," "very," or "somewhat," useful[1]				Bases for Each Media Rating
	Magazines	Newspapers	Television	Radio	
TOTAL	79%	75%	63%	34%	(501)
18-34	88	72	71	42	(186)
35-54	81	82	59	31	(171)
55 or older	66	73	57	29	(136)
Single	87	76	70	39	(67)
Married	80	76	63	34	(329)
Other	72	74	58	31	(104)
High School	74	75	62	37	(274)
College	86	75	63	30	(223)
Under $15,000	72	71	63	33	(141)
$15,000-$24,999	83	76	62	39	(115)
$25,000-$34,999	85	76	70	40	(96)
$35,000 or more	84	85	57	25	(63)
Employed	84	77	63	34	(270)
Not Employed	75	73	62	34	(230)
Prof., Managerial	87	75	55	30	(94)
White Collar	82	79	68	35	(104)
Blue Collar Service	81	78	67	38	(68)
Northeast	83	82	60	33	(112)
North Central	79	76	64	35	(130)
South	78	76	68	39	(161)
West	78	65	54	25	(98)
Non-Metro	76	75	61	38	(157)
50,000-$999,999	82	75	68	33	(134)
1,000,000 or over	80	76	61	30	(210)
Dept. Store Customer[2]	85	79	60	26	(197)
Specialty Store "	80	78	63	32	(253)
Nat'l Chain Store "	77	72	74	44	(123)
Discount Store "	74	70	66	40	(80)
5,4 day newspapers	80	79	63	34	(316)
3,2,1 days newspaper	85	77	67	42	(124)
None past 5 days	64	54	50	25	(56)

---

1) Table 19 shows % who say "extremely," or "very " useful.

2) Bought dress and/or separates in that type of store. Not mutually exclusive, since women may have bought each item in a different store.

APPENDIX C: Technical Appendix
(ORC Caravan Express)

Caravan Express Telephone Sampling Methodology

The essential characteristic of probability sampling is that, for each household in the universe under study, the probability that it will be included in the sample can be specified. This means that the degree of reliability of any finding from a study based on a probability sample can be estimated mathematically.

The sample design used for Caravan Express surveys is a major improvement over other standard methods which involve selecting listed phone numbers and then changing the last digit or two. This method suffers from defects which do not allow it to be strictly called a probability sample. One problem is that it is more likely for listed phone numbers, or unlisted numbers in close proximity to listed numbers, to be reached. Another problem involves the difficulty of maintaining up-to-date telephone directories.

The new sampling plan used to generate the sample for Caravan Express surveys is Two-Stage Random-Digit Dialing. This design gives all household telephones, both listed and unlisted, an equal probability of selection and minimizes the number of calls to nonresidential telephones.

This sampling procedure requires two stages, because instead of generating complete numbers at random, we generate a bank of numbers, then sample again within this bank.

The first step in this procedure is to list all possible area codes and three-digit prefixes for the continental United States. ORC obtains this list from AT&T on a computer tape every six months.

From these six-digit numbers we randomly generate, with replacement, complete telephone numbers by adding four-digit random numbers to the area code-prefix combinations.

Each telephone number generated will be used to define a bank of 500 numbers, which is used as a Primary Sampling Unit (PSU). For example, if the number 609-924-5968 had been generated, the corresponding PSU would be all numbers between 609-924-5500 and 609-924-5999.

The initial telephone number used to define a PSU is called and, if the number is a residential number, then the entire bank of 500 numbers is retained. If it is a nonworking or business listing, then the PSU is discarded. Therefore, we are selecting PSU's with probability proportional to the number of residential phones.

The second stage of sampling is conducted within each PSU chosen by the above procedure. This stage consists of randomly, without replacement, drawing a sample of telephone numbers. At this stage it is expected that over 60 % of the telephone numbers will be residential. The 60% residential is derived from a number of ORC and non-ORC studies. Even though these studies have mostly used PSU's of 100 telephone numbers, it is reasonable to assume that the results for PSU's of 500 will not be different.

To ensure that the sample is distributed properly, the two-stage procedure is conducted within each census region. This stratified sample is distributed proportionally to the number of households in each region.

A major advantage of this two-stage sampling plan is that a given telephone sample will contain more current numbers than are reachable by using the random increment approach.

Upon reaching the household to be interviewed, the person answering the phone is interviewed, providing he/she meets the age requirement of 18 or over and falls within the sample quota of 50% male and 50% female.

The sampling procedure is rigorous in concept and practice, and allows for the exact determination of the statistical precision of any finding.

APPENDIX D: Questionnaire

SECTION B
WOMEN ONLY

Now I'd like to ask you some questions about clothes and clothes shopping.

B1. Where did you buy your last dress? (What was the name of the store?)

☐

(Name of Store)

B2. Where did you buy your last separates, like jacket, skirt, or pants? (What was the name of the store?)

☐

(Name of Store)

B3. Thinking about the different kinds of stores that sell clothes for women, that is, department stores, discount stores, speciality shops, and national chains like Sears, Penney and Ward, which kind of store would you say:

ROTATE START

	Dept. Store	Dis-count	Speci-alty	Nat'l Chain	DON'T KNOW
a. Has the highest quality of clothes for women?	1	2	3	4	5
b. Gives the best value in women's clothes for the money?	1	2	3	4	5
c. Has the largest selection of women's clothes?	1	2	3	4	5
d. Has the most knowledgeable and helpful sales clerk?	1	2	3	4	5
e. Has the kind of clothes you like to wear?	1	2	3	4	5
f. Has the most up-to-date women's fashions?	1	2	3	4	5
g. Has the women's clothes arranged most attractively?	1	2	3	4	5
h. Has the women's clothes arranged most conveniently for you?	1	2	3	4	5
i. Is the easiest kind of store for you to shop in for clothes for yourself?	1	2	3	4	5

B4. What should department stores do to make it easier for you to shop for your clothes there?

____

____

____ ☐ ☐

B5. When you're buying good clothes for yourself, which is more important to you -- the fashion reputation of the store, or the name of the designer or manufacturer?

1 FASHION REPUTATION OF STORE
2 NAME OF DESIGNER OR MANUFACTURER
3 BOTH
4 NEITHER
5 IT DEPENDS
6 DON'T KNOW

B6. For the same amount of money, would you rather buy...

ROTATE START

1 One classic outfit that would be in style for a number of years or
2 Two or three outfits that are in the latest styles?
3 DON'T KNOW (DO NOT READ)

B7. Thinking about the different ways you keep in touch with what's in fashion, how useful are each of the following to you personally in finding out what's in fashion -- that is, extremely useful to you, very useful, somewhat useful, or not at all useful: (RANDOM START)

For instance, is (READ ITEM) extremely useful to you personally in finding out what's in fashion, very useful, somewhat useful, or not at all useful?

	Extremely	Very Useful	Somewhat	Not At All	DON'T KNOW
a. What you see or hear on television	1	2	3	4	5
b. What you see or read in newspapers	1	2	3	4	5
c. What you see or read in magazines	1	2	3	4	5
d. What you hear on the radio	1	2	3	4	5
e. Store catalogs	1	2	3	4	5
f. Window shopping	1	2	3	4	5
g. Going to fashion shows	1	2	3	4	5
h. Conversations with people you know	1	2	3	4	5
i. Seeing what other women are wearing	1	2	3	4	5

B8. When you're ready to buy clothes for yourself, in which one of the following do you find advertising most helpful to you in making up your mind about where to shop? (READ LIST. ROTATE START.)

1 ON TELEVISION
2 IN NEWSPAPERS
3 IN MAGAZINES
4 ON THE RADIO
5 NONE
6 DON'T KNOW

5–6: DO NOT READ

B9. Have you ever seen ads for clothes that led you to buy clothes for yourself, even though you weren't planning to?

1 YES
2 NO
3 DON'T KNOW → SKIP TO Q.B11

IF YES TO Q.B9, ASK:

B10. The last time that happened, where did that ad appear? Was it...(READ LIST. ROTATE START.)

1 ON TELEVSION
2 IN NEWSPAPERS
3 IN MAGAZINES
4 ON THE RADIO
5 NONE
6 DON'T KNOW → DO NOT READ

B11. On how many of the last five weekdays did you read a daily newspaper?

1 ONE
2 TWO
3 THREE
4 FOUR
5 FIVE
6 NONE
7 DON'T KNOW

SECTION S

(ORC Demographic Questions)

Now, just a few questions for background purposes.

S1. Are you currently...?

1 Employed full time
2 Employed part time
3 Not employed → SKIP TO Q.S3

IF "1" OR "2" ON Q.S1, ASK:

S2. What is your occupation? (REFER TO OCCUPATION CODE)

1 White collar--professional, managerial, owner
2 White collar--sales, clerical
3 Blue collar--craftsmen/foremen
4 Blue collar--semiskilled, unskilled
5 Service worker
6 OTHER (Specify):________________

S3. What is your current marital status. Are you...?

1 Married
2 Living as married
3 Single and never been married
4 Divorced
5 Separated
6 Widowed

S4. Altogether, including you and any others, how many people regularly live in this household?

1 ONE → SKIP TO Q.S7
2 TWO
3 THREE
4 FOUR
5 FIVE
6 SIX
7 SEVEN
8 EIGHT
9 NINE
10 TEN OR MORE

IF MORE THAN ONE PERSON ON Q.S4, ASK:

S5. Are there any children living in your household under 12 years of age?

1 YES
2 NO
3 DON'T KNOW

S6. Are there any children living in your household aged 12 through 17?

1 YES
2 NO
3 DON'T KNOW

S7. What was the last grade in school you completed?

1 8TH GRADE OR LESS
2 HIGH SCHOOL INCOMPLETE (GRADES 9, 10, 11)
3 HIGH SCHOOL COMPLETE (GRADE 12)
4 SOME COLLEGE
5 COLLEGE GRADUATE
6 POSTGRADUATE WORK
7 PROFESSIONAL/TECHNICAL SCHOOL
8 REFUSED

S8. What is your age?

1 18-20
2 21-24
3 25-29
4 30-34
5 35-39
6 40-44
7 45-49
8 50-54
9 55-59
10 60-64
11 65 OR OLDER
12 REFUSED

S9. Are you white, black or some other race?

1 WHITE
2 BLACK
3 OTHER
4 REFUSED

S10. Was your total household income before taxes for 1980 less than $25,000 or $25,000 or more?

1 LESS THAN $25,000 → Was that . . .? (READ CHOICES)

1 UNDER $7,000
2 $7,000 BUT LESS THAN $10,000
3 $10,000 BUT LESS THAN $15,000
4 $15,000 BUT LESS THAN $20,000
5 $20,000 BUT LESS THAN $25,000

2 $25,000 OR MORE → Was that . . . ? (READ CHOICES)

6 $25,000 BUT LESS THAN $30,000
7 $30,000 BUT LESS THAN $35,000
8 $35,000 BUT LESS THAN $50,000
9 $50,000 OR MORE

3 DON'T KNOW/REFUSED

THANK RESPONDENT AND END INTERVIEW.

Note: Sex was recorded at the beginning of the interview.

METHODOLOGICAL NOTE

The following tables are provided for the reader who is interested in obtaining a quick estimate either of the stability of a given percentage or of the significance of the difference between two percentages.

Confidence Intervals for a Given Percentage
(at the 95% confidence level)

N (Base for %)	Reported Percentage				
	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	2.6	3.5	4.0	4.3	4.4
250	3.7	5.0	5.7	6.1	6.2
200	4.2	5.5	6.3	6.8	6.9
150	4.8	6.4	7.3	7.8	8.0
100	5.9	7.8	9.0	9.6	9.8
50	8.3	11.1	12.7	11.6	13.9
25	11.8	15.7	18.0	19.2	19.6

Example: If a report shows that 20% of all respondents (when N = 500) answer in a particular way, the chances are about 95 out of 100 that the true value is 20% or - 3.5%, that is, that the range 23.5%-16.5% contains the true value.

Significance of Differences Between Percentages
(95% confidence level)

Average of the Base of Percentages Being Compared	Average of Reported Percentages				
	10 or 90%	20 or 80%	30 or 70%	40 or 60%	50%
500	3.7	4.9	5.7	6.1	6.2
250	5.2	7.1	8.1	8.6	8.8
200	5.9	7.8	8.9	9.6	9.8
150	6.8	9.1	10.3	11.0	11.3
100	8.3	11.0	12.7	13.6	13.9
50	11.7	15.7	18.0	19.2	19.7
25	16.7	22.2	25.2	27.2	27.7

Example: A report shows that 33% of all respondents from 30 to 39 years of age use a certain product and that only 27% of all respondents in the 40-to-49 age group use that product. Could this difference be due to chance?

In this example assume an average base of 500 for the represented percentages. The average of the percentages (33 + 27) equals 30% and the difference between the percentages is 6%.

Since 6% is greater than 5.7 (the figure in the table for this base and percentage) the chances are about 95 out of 100 that the product is used more by the 30-39 age group.

The table values are based on an assumption of simple random sampling. The figures may be too large if a stratified sampling technique was used and probably are too small if a cluster sampling technique was utilized. (For formulas used, see McNemar, Psychological Statistics, pages 54, 60.) The second table should be used with extreme caution if the bases being averaged are very different.

A 8600-7.4

3/11/82

Research Report

Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

THE READERSHIP OF NEWSPAPER PAGES AND SECTIONS: DEMOGRAPHIC BREAKDOWNS

February, 1982

Source: Simmons Market Research Bureau, 1981

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper industry and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

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INTRODUCTORY NOTE	1

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS GENERALLY READ, BY:

	Table Number for:		
	Adults	Males	Females
Totals	1	1	1
Age	2	3	4
Education	5	6	7
Household Income	8	9	10
Employment Status	11	12	13
Occupation	14	15	16

INTRODUCTORY NOTE

All measures of media exposure should be operationally defined, because the level of exposure obtained will vary with the method of measurement, whether the medium in question is print or broadcast.

The figures presented in this report are from the 1981 Simmons Study of Media and Markets. They were obtained in personal interviews with a multi-stage area probability sample of more than 15,000 adults. Initially, respondents were asked whether they generally read or look at every page of the daily newspaper, or whether they read only certain types of pages and sections. Those who indicated that they read only certain types of pages were shown a list of ten kinds of content found in most daily newspapers and asked which of these they read.

Perhaps the most important datum from this research is the finding that more than six out of ten daily newspaper readers (62%) report that they usually see every page of the newspaper they read. This does not mean that they "read" every item in the newspaper. However, since the human eye is a very efficient scanning device, these readers have the opportunity to be exposed to any editorial or advertising content appearing in the issue. Actual readership depends on the perceived interest or importance of the item.

For the minority who were directly questioned about specific types of content, the figures obtained are probably closer to "true" readership figures. In effect, these respondents are indicating that they usually seek out the content in question.

Findings from a 1971 study conducted by Audits & Surveys, Inc. in which respondents were taken through sample pages of newspapers they had read, suggest that the figures in the current report are roughly equivalent to "page opening." The principal difference is that page opening figures tend to be somewhat more stable across content categories (84% for the average page). This may mean that more selective readers who are looking for particular kinds of content are "accidentally" exposed to other pages as well, since individual pages may include several types of content.

Within any given demographic segment the figures shown in these tables may reasonably be assumed to show the relative level of interest in a particular kind of content. However, any differences found between demographic segments should be interpreted with caution, since these are affected by the percentages who report reading or looking at every page.[1] For example, the table on readership for total adults, by age, might suggest that adults 55 to 64 years of age are just as interested in "entertainment" content as those who are 18 to 24. This is only because more older readers report reading "every page". Other research addressed more specifically to this point indicates that adults in the youngest age group are more likely to read "entertainment" material.[2]

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[1] In each case, the percentage shown for a given type of page or section includes the percentage who say they read "every page."

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[2] For example, see "The Sunday Newspaper: A Five-Market Study" (Newspaper Advertising Bureau, August, 1980).

Table 1

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ
(Adults, by Sex)

	Percent of Weekday Audience		
	Adults	Males	Females
Usually read every page	62%	61%	62%
Read certain pages or sections	38	39	38
Business, finance	77	78	75
Classified	77	76	77
Comics	77	77	76
Editorial	80	77	81
Entertainment	82	78	85
Food, cooking	79	70	86
General news	94	93	95
Home furnishings, improvement	77	71	82
Sports	81	88	74
TV, radio listings	79	75	81
Projected base: Average Weekday Audience (in 000's)	(107,944)	(51,703)	(56,242)

Source: Simmons Market Research Bureau, 1981

Table 2

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Adults, by Age)

	Percent of Weekday Audience					
	18-24	25-34	35-44	45-54	55-64	65 +
Usually read every page	50%	61%	61%	66%	63%	68%
Read certain pages or sections	50	39	39	34	37	32
Business, finance	66	75	75	81	80	80
Classified	71	79	76	79	76	76
Comics	70	76	75	80	79	80
Editorial	67	77	79	84	85	84
Entertainment	78	84	82	83	82	81
Food, cooking	65	78	79	80	83	84
General news	89	93	94	97	95	96
Home furnishings, improvement	63	77	78	80	80	81
Sports	77	80	81	83	81	82
TV, radio listings	71	77	77	81	81	83
Projected base: Average Weekday Audience (in 000's)	(16,758)	(23,036)	(18,134)	(17,043)	(16,164)	(16,808)

Source: Simmons Market Research Bureau, 1981

Table 3

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Males, by Age)

	Percent of Weekday Audience					
	18-24	25-34	35-44	45-54	55-64	65 +
Usually read every page	48%	60%	63%	67%	64%	68%
Read certain pages or sections	52	40	37	33	36	32
Business, finance	68	76	80	83	83	84
Classified	72	77	78	80	75	76
Comics	70	75	76	82	80	81
Editorial	63	75	78	83	83	85
Entertainment	73	80	80	79	80	79
Food, cooking	57	69	73	74	76	76
General news	88	92	93	97	96	96
Home furnishings, improvement	56	70	74	75	76	76
Sports	85	88	90	90	88	88
TV, radio listings	65	75	74	79	80	81
Projected base: Average Weekday Audience (in 000's)	(8,747)	(11,211)	(8,626)	(8,257)	(7,630)	(7,232)

Source: Simmons Market Research Bureau, 1981

Table 4

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ
(Females, by Age)

	Percent of Weekday Audience					
	18-24	25-34	35-44	45-54	55-64	65 +
Usually read every page	53%	61%	61%	65%	63%	69%
Read certain pages or sections	47	39	39	35	37	31
Business, finance	66	73	73	79	78	78
Classified	72	79	76	79	78	78
Comics	70	76	75	78	78	81
Editorial	71	78	82	84	87	84
Entertainment	85	87	85	87	86	83
Food, cooking	75	85	87	87	91	90
General news	90	93	96	96	96	97
Home furnishings, improvement	71	82	83	84	84	85
Sports	70	72	75	75	75	79
TV, radio listings	78	79	81	82	83	85
Projected base: Average Weekday Audience (in 000's)	(8,011)	(11,826)	(9,509)	(8,786)	(8,534)	(9,576)

Source: Simmons Market Research Bureau, 1981

Table 5

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Adults, by Education)

	Percent of Weekday Audience			
	College Graduate	1-3 yrs. College	High School Graduate	Some High School or Less
Usually read every page	61%	66%	61%	60%
Read certain pages or sections	39	34	39	40
Business, finance	82	80	75	72
Classified	77	80	77	74
Comics	78	80	76	74
Editorial	83	82	79	76
Entertainment	84	85	83	78
Food, cooking	77	79	79	78
General news	96	94	94	93
Home furnishings, improvement	78	78	76	75
Sports	82	84	80	79
TV, radio listings	77	80	78	79
Projected base: Average Weekday Audience (in 000's)	(19,432)	(18,983)	(42,018)	(27,512)

Source: Simmons Market Research Bureau, 1981

Table 6

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Males, by Education)

	Percent of Weekday Audience			
	College Graduate	1-3 yrs. College	High School Graduate	Some High School or Less
Usually read every page	61%	68%	60%	58%
Read certain pages or sections	39	32	40	42
Business, finance	85	84	75	73
Classified	77	81	76	73
Comics	79	81	76	75
Editorial	83	82	74	74
Entertainment	82	84	76	74
Food, cooking	72	73	68	69
General news	95	94	92	93
Home furnishings, improvement	74	74	68	69
Sports	87	90	88	86
TV, radio listings	75	79	74	74
Projected base: Average Weekday Audience (in 000's)	(11,164)	(9,486)	(17,870)	(13,183)

Source: Simmons Market Research Bureau, 1981

Table 7

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Females, by Education)

	Percent of Weekday Audience			
	College Graduate	1-3 yrs. College	High School Graduate	Some High School or Less
Usually read every page	62%	65%	62%	62%
Read certain pages or sections	38	35	38	38
Business, finance	79	78	75	71
Classified	78	80	77	75
Comics	79	79	77	74
Editorial	84	83	82	78
Entertainment	87	86	88	81
Food, cooking	85	85	87	87
General news	98	95	95	93
Home furnishings, improvement	83	82	83	81
Sports	75	77	74	73
TV, radio listings	80	82	81	83
Projected base: Average Weekday Audience (in 000's)	(8,268)	(9,497)	(24,148)	(14,328)

Source: Simmons Market Research Bureau, 1981

Table 8

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Adults, by Household Income)

	Percent of Weekday Audience				
	$35,000 & Over	$25,000-$34,999	$15,000-$24,999	$10,000-$14,999	Under $10,000
Usually read every page	59%	60%	64%	62%	63%
Read certain pages or sections	41	40	36	38	37
Business, finance	78	77	78	74	74
Classified	75	77	79	77	75
Comics	76	76	79	76	77
Editorial	79	79	81	79	78
Entertainment	81	83	84	81	80
Food, cooking	74	78	81	80	80
General news	94	94	95	94	93
Home furnishings, improvement	74	76	79	77	76
Sports	81	80	82	79	81
TV, radio listings	75	77	80	79	81
Projected base: Average Weekday Audience (in 000's)	(21,954)	(23,283)	(27,186)	(20,047)	(15,475)

Source: Simmons Market Research Bureau, 1981

Table 9

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Males, by Household Income)

	Percent of Weekday Audience				
	$35,000 & Over	$25,000-$34,999	$15,000-$24,999	$10,000-$14,999	Under $10,000
Usually read every page	60%	60%	62%	64%	60%
Read certain pages or sections	40	40	38	36	40
Business, finance	81	78	79	77	74
Classified	75	77	78	77	71
Comics	77	76	79	76	77
Editorial	77	78	78	78	75
Entertainment	77	79	81	75	76
Food, cooking	68	70	72	73	71
General news	94	94	94	93	91
Home furnishings, improvement	69	71	72	72	71
Sports	88	88	89	87	88
TV, radio listings	72	74	77	76	78
Projected base: Average Weekday Audience (in 000's)	(12,697)	(11,933)	(12,532)	(8,893)	(5,648)

Source: Simmons Market Research Bureau, 1981

Table 10

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Females, by Household Income)

	Percent of Weekday Audience				
	$35,000 & Over	$25,000-$34,999	$15,000-$24,999	$10,000-$14,999	Under $10,000
Usually read every page	58%	60%	66%	61%	65%
Read certain pages or sections	42	40	34	39	35
Business, finance	75	75	78	72	74
Classified	75	76	80	77	77
Comics	74	76	79	76	78
Editorial	81	81	83	80	80
Entertainment	87	87	87	86	82
Food, cooking	83	87	88	86	85
General news	96	94	96	94	94
Home furnishings, improvement	82	82	85	82	78
Sports	72	73	76	74	77
TV, radio listings	78	80	83	82	84
Projected base: Average Weekday Audience (in 000's)	(9,257)	(11,350)	(14,655)	(11,154)	(9,827)

Source: Simmons Market Research Bureau, 1981

Table 11

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Adults, by Employment Status)

	Percent of Weekday Audience			
	Total Employed	Full Time	Part Time	Not Employed
Usually read every page	60%	61%	60%	64%
Read certain pages or sections	40	39	40	36
Business, finance	76	77	74	77
Classified	76	77	75	77
Comics	76	76	77	78
Editorial	78	79	79	81
Entertainment	81	82	84	83
Food, cooking	75	76	77	83
General news	93	94	94	95
Home furnishings, improvement	74	75	75	80
Sports	82	83	78	79
TV, radio listings	76	77	81	81
Projected base: Average Weekday Audience (in 000's)	(66,940)	(58,344)	(8,595)	(41,005)

Source: Simmons Market Research Bureau, 1981

Table 12

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Males, by Employment Status)

	Percent of Weekday Audience	
	Total Employed[1]	Not Employed
Usually read every page	60%	63%
Read certain pages or sections	40	37
Business, finance	77	79
Classified	76	74
Comics	76	79
Editorial	77	77
Entertainment	78	77
Food, cooking	69	73
General news	93	93
Home furnishings, improvement	70	72
Sports	88	85
TV, radio listings	74	77
Projected base: Average Weekday Audience (in 000's)	(38,358)	(13,345)

Source: Simmons Market Research Bureau, 1981

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[1] Figures for full-time and part-time employed have been excluded because of small part-time base.

Table 13

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Females, by Employment Status)

	Percent of Weekday Audience			
	Total Employed	Full Time	Part Time	Not Employed
Usually read every page	61%	60%	62%	64%
Read certain pages or sections	39	40	38	36
Business, finance	74	74	74	76
Classified	77	76	79	77
Comics	76	75	77	78
Editorial	80	79	82	82
Entertainment	86	85	87	85
Food, cooking	84	84	84	88
General news	95	94	95	95
Home furnishings, improvement	81	80	81	83
Sports	74	73	74	75
TV, radio listings	80	79	83	83
Projected base: Average Weekday Audience (in 000's)	(28,582)	(22,368)	(6,214)	(27,660)

Source: Simmons Market Research Bureau, 1981

Table 14

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Adults, by Occupation)

	Percent of Weekday Audience			
	Professional, Manager	Clerical, Sales	Craftsman, Foreman	Other Employed
Usually read every page	63%	60%	59%	59%
Read certain pages or sections	37	40	41	41
Business, finance	82	75	73	72
Classified	78	76	78	76
Comics	79	76	74	74
Editorial	83	78	74	75
Entertainment	84	84	76	81
Food, cooking	77	79	67	75
General news	95	93	94	94
Home furnishings, improvement	77	77	68	73
Sports	84	77	89	82
TV, radio listings	77	77	72	79
Projected base: Average Weekday Audience (in 000's)	(22,449)	(16,517)	(8,480)	(19,494)

Source: Simmons Market Research Bureau, 1981

Table 15

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Males, by Occupation)

	Percent of Weekday Audience			
	Professional, Manager	Clerical, Sales	Craftsman, Foreman	Other Employed
Usually read every page	62%	61%	58%	60%
Read certain pages or sections	38	39	42	40
Business, finance	84	82	72	72
Classified	76	76	78	77
Comics	79	80	73	74
Editorial	82	79	74	74
Entertainment	81	81	74	79
Food, cooking	71	72	65	69
General news	95	92	93	93
Home furnishings, improvement	74	71	66	69
Sports	88	89	89	88
TV, radio listings	75	75	71	76
Projected base: Average Weekday Audience (in 000's)	(14,038)	(4,773)	(7,910)	(11,637)

Source: Simmons Market Research Bureau, 1981

Table 16

TYPES OF DAILY NEWSPAPER PAGES OR SECTIONS USUALLY READ

(Females, by Occupation)

	Percent of Weekday Audience		
	Professional, Manager	Clerical, Sales	Other Employed
Usually read every page	65%	60%	57%
Read certain pages or sections	35	40	43
Business, finance	79	73	71
Classified	80	76	75
Comics	80	74	73
Editorial	86	79	76
Entertainment	89	85	84
Food, cooking	87	82	84
General news	97	94	93
Home furnishings, improvement	84	80	79
Sports	76	73	72
TV, radio listings	81	79	81
Projected base: Average Weekday Audience (in 000's)	(8,411)	(11,744)	(8,428)

Source: Simmons Market Research Bureau, 1981

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Research Report

COUPON FACTS

Findings on Cents-Off Coupon Usage and Users

Newspaper Advertising Bureau, Inc. 485 Lexington Avenue, New York, New York 10017

BEST AVAILABLE COPY

COUPON FACTS

Findings on Cents-Off Coupon Usage and Users

April 1982

This study is one of a series of marketing research reports prepared by the Newspaper Advertising Bureau, Inc., as a service to the newspaper industry and its advertisers. These reports form the basis of recommendations for the efficient use of the newspaper medium to meet the specific marketing needs of individual companies.

CONTENTS AND HIGHLIGHTS

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I. The Growth of Couponing....................................1

The number of manufacturers' coupons distributed has surpassed 100 billion for the first time in history. In the last five years, the number of coupons distributed has more than doubled.

II. Coupon Distribution..2

Over 3/4 of all manufacturers' coupons are distributed in newspapers. There has been a shift away from ROP ads to free-standing inserts.

III. Redemption Rates..4

Redemption rates range in the 3% range for mass media, though vehicles that make coupons stand out--inserts and pop-ups--do better. Direct mail receives redemption rates approaching 11%.

IV. Cost Per Redeemed Coupon....................................7

Most mass media enable manufacturers to reach consumers at a cost of about 30¢ per redeemed coupon, of which about 5¢ is for media expenses, with the remainder covering face value and handling.

V. Face Value...8

The average face value is now 19.8¢, though the modal rate is only 15¢. While the face value is at a new high, its slow growth with respect to inflation has caused face values to be lower in terms of real dollars.

VI. Effect of Coupons on Sales.................................10

Two coupon ads that ran nationally were tested for their sales effect by the use of scanning data. One product doubled its sales during the week the ad appeared while the other more than tripled its sales. The following week, sales were still above normal.

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VII. Coupon Usage....................11

Seventy-one percent of all female homemakers report using cents-off coupons, and most of these (87%) use newspaper coupons.

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I. Growth of Couponing

The number of coupons distributed has continued to grow breaking previous records and exceeding 100 billion for the first time. In 1982, 102.4 billion manufacturers' coupons were distributed, exceeding by 13% the amount distributed during the previous year and topping by 2¼ times the amount distributed five years previously. These figures do not take into account store coupons, which are redeemable only in specific stores and not funded or controlled by manufacturers.

Table 1

MANUFACTURERS' COUPONS DISTRIBUTED

1976	45.8 billion
1977	62.2
1978	72.7
1979	81.2
1980	90.6
1981	102.4

Source: Nielsen Clearing House, 1982.

II. Coupon Distribution

Newspapers continue to be the medium through which most coupons are distributed, and have actually been increasing their lead. The form newspaper coupons take has been changing, however, with a marked swing away from ROP ads--though that still is the way the plurality of coupons are distributed--to free standing inserts.

Table 2

COUPON DISTRIBUTION PATTERNS

	1981	1980	1979
Newspapers	78.5%	75.6%	76.7%
Daily ROP	27.3	31.1	36.2
Co-op	17.7	17.1	16.1
Sunday Supp.	7.3	9.0	9.5
F.S.I.	26.2	18.4	14.9
Magazines	11.8%	13.3%	12.2%
Direct Mail	3.3%	3.4%	3.2%
In/On Pack.	6.4%	7.7%	7.9%

Source: Nielsen Clearing House, 1982.

The Nielsen Clearing House compiled distribution by various grocery product groups. These figures, which are for the year 1980, show newspapers as being the method of choice for distributing over 75% of all coupons in each food category.

Table 3

COUPON DISTRIBUTION BY GROCERY PRODUCT CATEGORY

	Meat & Dairy	Other Packaged Foods	Frozen Foods	Beverages	Household Products	Health & Beauty Aids
Newspapers:	83%	76%	80%	80%	78%	69%
ROP Solo	41	39	50	51	20	13
Co-op	17	18	12	10	18	16
Sunday Supp.	8	7	7	7	10	14
F.S.I.	17	12	11	12	30	26
Magazine	10%	12%	12%	10%	11%	19%
Direct Mail	2%	2%	3%	5%	5%	5%
In/On Pack.	5%	10%	5%	5%	6%	7%

Source: Nielsen Clearing House, 1981.

III. Redemption Rates

Redemption rates vary depending on the effectiveness of the ad, the attractiveness of the offer, how well each medium is used, how readily available the item is and the effectiveness of back-up support. The Nielsen Clearing House believes middle-half ranges serve as a better guide than an average, giving analysts an idea of how well or how poorly a company's offer could potentially draw; media differ in their inherent pulling power. All three of the major clearing houses agree that direct mail offers the best redemption rate (other than in/on pack, which not all measure) though because of its high cost it is not always efficient to use. Newspapers generally offer the lowest redemption rates, though they also cost the least. Free-standing inserts perform very well in newspapers, however, and a food offer placed in the best food day section next to some recipes, for instance, might pull much better than average.

Table 4

COUPON REDEMPTION RATES BY MEDIA

	Nielsen Average	Nielsen Middle-half Range	Donnelley	MMS
Newspaper:				
ROP Solo	3.1%	1.8%-4.1%	2.2%	3.46%
Co-op	3.4	2.3 -4.8	2.5	3.80
Sunday Supp.	2.1	1.1 -3.0	2.6	3.56
F.S.I.	5.1	3.3 -6.8	3.8	5.50
Magazine:				
On-page	2.6%	1.5%-3.6%	2.8%	3.79%
Pop-up	5.6	3.9 -7.8	3.8	N.A.
Direct Mail	11.6%	8.1%-17.9%	10.5%	N.A.

Nielsen-Nielsen Clearing House, Donnelley-Donnelley Marketing, MMS-Manufacturers Marketing Service, N.A.-Not Available.

Source: Haugh, 1981.

In/on package coupons are a special case. They are not distributed by the mass media but rather are carried on or in packaged products. They may be for the same product contained in the package, which encourages repeat purchases but does little to encourage new users, or be for a different product--the former, of course, has higher redemption rates as the coupon is going to people who already purchase the product, though many would have purchased it again without the inducement of a coupon. Coupons can appear either on the package or inside it--the latter offers a much better redemption rate but the additional cost of printing the former is practically nil.

Table 5

REDEMPTION RATES OF IN/ON PACK. COUPONS

	Average	Middle-Half Range
Same Product, In Pack.	18.4%	9.6-30.7
Same Product, On Pack.	13.3	7.1-25.6
Different Product, In Pack.	6.8	3.1-10.8
Different Product, On Pack.	4.4	2.5- 8.2

Source: Nielsen Clearing House, 1981.

A comparison of redemption rates by media by grocery product groups shows little difference in the effectiveness of specific media with specific products--though redemption in general is higher for certain products than others. Meat and dairy, other packaged goods and beverage coupons redeem higher than others. This, of course, is largely a factor of product usage in that more people eat meat, for instance, than use health and beauty aids.

Table 6

COUPON REDEMPTION RATES BY MEDIA AND GROCERY PRODUCT GROUPS

	Meat & Dairy	Other Packaged Foods	Frozen Foods	Beverages	Household Products	Health & Beauty Aids
Newspapers:						
ROP Solo	3.5%	3.2%	2.4%	3.8%	2.6%	2.0%
Co-op	3.7	3.5	3.0	3.4	3.0	2.5
Sunday Supp.	1.7	2.1	1.7	2.7	1.9	1.6
F.S.I.	5.7	5.9	4.6	5.5	4.3	3.2
Magazines:						
On Page	2.9%	2.9%	3.1%	2.3%	1.7%	1.4%
Pop-Up	6.7	5.1	4.6	6.5	5.2	3.5
Direct Mail	10.7%	13.3%	11.0%	11.2%	10.8%	7.2%
In/On Pack:						
Same Product, In Pack.	20.7%	18.1%	19.4%	17.8%	18.0%	10.3%
Same Product, On Pack.	14.9	13.5	11.3	11.8	12.9	11.0
Cross Product, In Pack.	8.7	6.7	8.6	6.8	6.3	3.1
Cross Product, On Pack.	4.1	4.5	5.5	4.9	2.9	4.2

Source: Nielsen Clearing House, 1981.

IV. Cost Per Redeemed Coupon

The cost per redeemed coupon is in the low 30¢ range for most media, including a fixed charge of 7¢ per coupon for handling and a face value of 19.8¢, the average in 1981. The actual distribution and printing cost of coupons thus comes to about 5¢ (though the analysis includes only 25% of the cost of a full page ROP ad in newspapers, Sunday supplements and magazines as coupon-related costs, assuming that the ad containing the coupon has value of its own). These cost figures should be taken only as a general guide, however, with redemption rates and media and production costs varying widely.

Table 6

COST PER REDEEMED COUPON

Newspaper:	
ROP Solo	31.2¢
Co-op	30.8
Sunday Supp.	40.4
F.S.I.	32.8
Magazine:	
On Page	38.3¢
Pop-Up	56.2
Direct Mail	33.9¢
In/On Pack.	27.9¢

Source: Analysis by Newspaper Advertising Bureau based on update of 1978 figures of Strang, 1981, p. 9 Nielsen Clearing House, 1981.

V. Face Value of Coupons

While the face values of coupons continues to rise to record highs, the increase is not in line with inflation. Five years ago, coupons had an average face value of 14.2¢, but given inflation, that would be equivalent to 22.7¢ today, as compared with the actual 1981 average of 19.8¢.

Table 7

AVERAGE FACE VALUE OF COUPONS

	Average Value	Value in 1981 Cents
1981	19.8¢	19.8¢
1980	18.5	20.4
1979	17.1	21.4
1978	15.6	21.7
1977	14.9	22.4
1976	14.2	22.7

Source: Nielsen Clearing House, 1982.
Bureau of Labor Statistics, 1982.

The modal face value of coupons is now at 15¢, though plenty of 10¢ coupons are still around, and 25¢ coupons are becoming commonplace.

Table 8

DISTRIBUTION OF FACE VALUES OF CENTS-OFF COUPONS

7¢	1.3%
10	22.8
12	4.8
15	27.3
20	13.1
25	18.1
30 +	12.6

Source: Nielsen Clearing House, 1982.

VI. Effect of Coupons on Sales

Through scanning data obtained from NABSCAN, Inc., product movement data is available week by week and can be coordinated with advertising to evaluate its effect. The NAB analysed two nationally-run coupon ads run on November 12, one for Lipton Lots-a-Noodles Soup, a new product, and one for Minute Maid Apple Juice. The soup ad was 390 lines in size (SAU #14) while the apple juice ad was 480 lines in size (SAU #17). Each ad had a coupon good for 15¢. Data from 7 scanner stores in 7 different cities were analysed. It was found that product sales increased dramatically the week the coupon appeared (it appeared on the first day of the measurement-week), and held up even the week following.

Table 9

MOVEMENT OF PRODUCTS SUPPORTED BY COUPONED-NEWSPAPER ADVERTISING

	Lipton Lots-a-Noodles Soup	Minute Maid Apple Juice
Week Before Ad (11/5-11/11)	252 units	79 units
Week of Ad (11/12-11/18)	456	239
Week After Ad (11/19-11/25)	326	222

Source: NABSCAN, 1981.

VII. Coupon Usage

The 1981 Study of Media and Markets by Simmons Market Research Bureau reports that 71% of all female homemakers use cents-off coupons. Users get their coupons from several different sources, but the most favored medium is newspapers. Nearly nine out of ten users (87%) obtain coupons from newspapers, as compared with 69% using the next most popular medium (magazines). (See accompanying table.)

For each medium, SMRB classifies users into three groups: heavy, medium and light. It should be noted that the criterion for heavy usage is more stringent for newspapers than for any of the four other sources reported. For newspapers, heavy coupon users are defined as those who use them "more than once a week". For the other media, the measure is "once a week or more often". If newspaper usage were reported on the same basis, 33% of all female homemakers would be "heavy" users of newspaper coupons, as compared with 14% for the medium ranking second (again magazines).

Table 10

USAGE OF CENTS-OFF COUPONS BY FEMALE HOMEMAKERS

	Percent of: Female Homemakers	Percent of: Coupon Users
Ever use cents-off coupons	71%	100%
Use coupons from newspapers	61%	87%
Heavy-more than once a week	9	13
Medium-once a week	24	34
Light-less often	28	40
Use coupons from magazines	49%	69%
Heavy-once a week or more often	14	20
Medium-2-3 times a month	15	21
Light-once a month or less often	20	28
Use coupons in or on packages	44%	63%
Heavy-once a week or more often	13	18
Medium-2-3 times a month	13	18
Light-once a month or less often	18	27
Use coupons from mail	46%	65%
Heavy-once a week or more often	11	16
Medium-1-3 times a month	21	29
Light-less than once a month	14	20
Use coupons handed out near stores	14%	20%
Heavy-once a week or more often	4	6
Medium-1-3 times a month	4	6
Light-less than once a month	6	8

Source: Simmons Market Research Bureau, 1981.

VIII. Coupon Size and Design

At present, manufacturers' coupons are limited to one of two sizes--dollar bill size (2 5/8" x 6 1/8") or punch card size (2.456" x 3.25") unless they are manually processed. Coupons in other sizes cannot fit through automated equipment used by the Nielsen Clearing House and similar organizations. Creativity can be used in the designs, but one must keep in mind that the coupon should readily be recognizable as a coupon to catch the eyes of those seeking them out.

The following are some pointers put out by the Association of National Advertisers (1962):

(1) Redemption value should be printed in bold type in at least two places.

(2) The name of the product and the number of packages of each size that must be purchased should be clearly specified. (Note: These now must also be specified on the outside of the package in the case of in-product coupons as well as on the coupon itself if the coupon is advertised on the outside of the package.)

(3) The consumer should not be required to fill in a name and address.

(4) The words "Store Coupon" should be printed in bold type to distinguish these coupons from "mailback" certificates.

(5) For legal reasons in some states, consider including a legal cash redemption value, such as "1/20 of 1¢" on all coupons.

It is also a common practice now to include a statement releasing oneself from having to redeem coupons when not used in the legal manner. Many manufacturers include a clause asserting that invoices showing purchases of sufficient quantities to cover claimed purchases must be made available on request.

Coupons often give consumers a set amount off, two items for the price of one, or the chance to buy items at a set price. All of these work but one type of offer to avoid, according to a study done by the Palo Alto Times (1977), is giving consumers a percentage off the regular price. Except for half-off coupons, percentage discounts don't seem to have much meaning for consumers and thus don't result in as much pull.

IX. Clearing Houses and Co-op Coupon Companies

Clearing Houses are specialized operations that handle the collection and counting of coupons, the reimbursement of retailers, and take precautions against the various forms of misredemption (counterfeit coupons, redeeming of coupons without purchase of the product, etc.). The three largest clearing houses are as follows:

Donnelley Marketing
1515 Summer Street
Stamford, Connecticut 06905
(203)357-8600

Manufacturers Marketing Services
4 Heron Court
Bridgeport, New Jersey 08014

Nielsen Clearing House
1900 North Third Street
Clinton, Iowa 52732
(319)242-4505
New York (212)868-8830
Chicago (312)498-6300
Los Angeles (213)466-2023

Other companies distribute coupons in newspapers nationally or regionally, either by buying a page or by including an insert, and presenting the consumer with an array of coupons. Redemption rates of such coupons are traditionally higher as the mass of coupons in itself serves as a draw to readers. A few of these companies are:

John Blair Marketing
717 Fifth Avenue
New York, New York 10022
(212)980-5252

Cato Johnson, Inc.
(The Money Page)
100 Park Avenue
New York, New York 10017
(212)210-5594

Marketing Corporation of America
(Newspaper Co-op Couponing)
285 Riverside Avenue
Westport, Connecticut 06880
(203)226-1061

Marketing Showcase, Inc.
(Product Movers)
621 Avenue of the Americas
New York, New York 10011
(212)924-7551

McGill Jensen Marketing
(Ad Inserts)
12 Havemyer Place
Greenwich, Connecticut 06830
(203)629-4986

The Sunflower Group
7221 West 79 Street
Overland Park, Kansas 66204
(913)341-7536
(serves C&D counties)

George F. Valassis and Company
26 Acorn Place
Ridgefield, Connecticut 06887
(203)436-9665

X. Other Sources of Information

The single largest repository of couponing information is the Nielsen Clearing House of Clinton, Iowa. They publish on a yearly basis the NCH Research Report, which includes the latest figures on coupon growth, media distribution and redemption rates, the NCH Reporter which comes out several times during the year and deals with current issues in couponing, and A Product Manager's Guide to Effective Couponing, a manual of coupon information.

Other clearing houses, such as the Manufacturers Marketing Service of Bridgeport, New Jersey and Donnelley Marketing of Stamford, Connecticut also have information available, as do the media-promotion bureaus in New York: the Magazine Publishers Association (212-752-0005), the Direct Mail Marketing Association (212-689-4977), and the Newspaper Advertising Bureau (212-557-1811), the producer of this report.

XI. References

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